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THE

PARTNERSHIP HANDBOOK

Written by Flo Frank and Anne Smith for Human Resources Development Canada

Canada

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This project was sponsored by the Labour Market Learning and Development Unit, Human Resources Development Canada (HRDC).

Copies of this handbook, as well as the related Facilitator's Guide, in both French and English, are available from the HRDC Internet website at http://www.hrdc-drhc.gc.ca/common/partnr.shtml.

Copies or further information may also be obtained from:

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INTRODUCTION

Strong, viable partnerships don't just happen. They need to be understood, properly developed and well maintained. Skills, knowledge and experience are required when we bring people together to form useful and productive partnerships. Many of us do not feel confident in each and every aspect of partnering or, if we do, we may not be able to share our knowledge effectively with others. The objectives of this book are to help people learn more about what partnerships are and to offer suggestions about how to be effective in them.

Although the main emphasis of this handbook is on community-based partnerships, the information and processes are applicable to most partnership efforts. Partnerships become distinct when they formalize their arrangements. This can be done through a variety of mechanisms such as informal agreements, memoranda or letters of understanding, formal accords or traditional legal structures. It is vital that all partners think through the implications of what they are entering into before committing themselves. Partnerships can be considered legally binding even without a written agreement, so legal advice should be obtained at the point where partners are committed to joint action or the sharing of resources.

Partnerships are not new. They have been around for a very long time. What is new is the emphasis being placed on partnerships affecting so many different aspects of our lives. From community services to employment and economic initiatives, groups who might not otherwise be sharing resources are joining together and forming partnerships. The basis for this is the belief that working together is more effective than working in isolation. This belief is being embraced by organizations that need to consider or connect a wide range of interests as well as by those with a single focus. Partnerships are becoming a logical and popular way of doing business, particularly when the business is improving communities or helping the people in them.

Why this handbook was developed

This handbook has been created by the Labour Market Learning and Development Unit at Human Resources Development Canada (HRDC). It has been designed to support the most current understanding and development of partnerships. It recognizes that partnerships are an important vehicle for building community capacity and undertaking community development activities.

Although this handbook was funded by government, it has been designed as a guide or reference book only, not as a compulsory agenda for those involved in government-funded partnerships.

Who this handbook is for

The content of this handbook comes from the knowledge and experience of numerous individuals who have been directly involved in partnerships, organizational transition and community development. As a handbook, it is designed primarily for those who have an interest in partnerships but who may not have an in-depth understanding of the concept, the process or the resources available across Canada. It provides a focus for partnership discussions and a structure within which partnerships can operate.

For those already possessing knowledge about the topic and/or experience in the field, this handbook provides a resource for further exploring partnerships and reviewing the basics of the partnership process.

What this handbook will do

This handbook is designed to spark, rekindle and reaffirm your interest in partnerships. To do this, information and tools are offered to assist in building common understanding and appropriate approaches. This handbook is designed to provide information, tips and questions about the basics of partnerships, which can be applied to your own circumstances.

By reading this book, you should be able to:

- define the term partnership;
- explore the conditions that support partnerships;
- explain the partnership process;
- explain the skills and knowledge needed for effective partnerships;
- identify the most common problems that partnerships face; and
- explain how experience tells us these problems may be overcome.

What this handbook will not do

This handbook may not provide all that you need to know to pursue partnerships. If you are interested in learning more about this subject area, it is beneficial to seek out other resources and talk to individuals who have experience in partnership design, development and implementation.

Contents of the handbook

The content of the handbook is as follows:

Section I defines what a partnership is and what it is not;

Section II identifies the conditions that support partnerships and provides examples of assessment tools;

Section III outlines the partnership process and how to apply it;

Section IV explores the knowledge, attitudes and skills required to undertake a partnership;

Section V examines common issues and concerns as well as providing some possible solutions; and

Section VI describes the characteristics of a variety of partnership approaches.

Throughout, there are sections labeled "Lessons from Experience" and "Points to Ponder".

"Lessons from Experience" provides quick points about various aspects of each section.

"Points to Ponder" offers questions based on the information that has been provided in each section. The questions are designed to help generate thoughts about what has been read and how it might apply to your own situation. These questions can also be used to initiate discussion.

In addition, you will find stories that are based upon partnership experiences across Canada. They are snapshots of different situations and are intended to be brief and to the point. In order to keep them short and simple, there is very little contextual background or detail provided.

A *Facilitator's Guide* has also been developed and is available through Human Resources Development Canada. It is a tool designed to help advance learning and guide discussions about partnerships and is based on the contents of this handbook. A copy may be obtained from HRDC as per the inside cover of this book.

SECTION 1 -
WHAT IS A PARTNERSHIP?

This section of the handbook describes what a partnership is and what it is not. It also provides some insight into various partnership functions and degree of involvement.

A partnership is defined as a relationship where two or more parties, having compatible goals, form an agreement to do something together. Partnerships are about people working together in a mutually beneficial relationship, oftentimes doing things together that might not be able to be achieved alone.

Partnership implies the sharing of resources, work, risk, responsibility, decision-making, power, benefits and burdens. It should add value to each partner's respective services, products or situations. In partnerships, there is give and take. Partnerships, therefore, are based on identifiable responsibilities, joint rights and obligations, and are often founded on legalities, shared governance or regulations. Having the right people at the right time doing the right things together is what we strive for when creating partnerships.

A true partnership (in the strictest sense of the word) establishes a formal relationship between partners. Normally the partners have their own identity outside the partnership and are independently accountable to others as well as to the partnership. Actions or transactions occur where each party expects to benefit and agrees to share the risk.

Simply put, a partnership is an agreement to do something together that will benefit all involved.

There are many motivations for forming a partnership. Finding creative solutions, improving diversity, exploring holistic approaches and increasing or improving business are but a few. Partnerships often build on what is already being done while avoiding duplication or fragmentation. Of course, partnering also comes with some potential difficulties. For example, clashing values or interests, perceptions of unfair advantage, fear of change and displaced power, influence or status can all be problematic.

The length of time a partnership operates can vary from short-term to long-term, and they can be either simple or complex in their design. Partnerships could be formed for any number of reasons and purposes; however, they have certain similarities in that they:

- share authority;
- have joint investment of resources;
- result in mutual benefits; and
- share risk, responsibility and accountability.

Partnerships should be flexible, easy to understand and enjoyable; however, they often require some official or formal agreement. The agreement is not always to satisfy legal requirements as much as it is to make certain that everyone involved knows the following:

- what the partnership is about;
- who is doing what; and
- what outcomes are expected.

What a partnership is not

There is a bit of confusion about what is or is not a partnership. Although a name is just a name, generally a true partnership does not exist when:

- there is simply a gathering of people who want to do things;
- there is a hidden motivation;
- there is an appearance of common ground but actually many agendas exist;
- there is tokenism, or the partnership was established just for appearances;
- one person has all the power and/or drives the process; or
- there is no sharing of risk, responsibility, accountability and benefits.

Why a partnership and not something else?

Usually, a catalyst sparks partnerships. There may be an opportunity that presents itself, a request from someone or even a crisis of some kind. Partnerships provide a challenge and the possibility to be more than just the sum of the individuals working together. They offer an effective and practical approach to solving problems, seizing opportunities and planning results. Partnerships can, if designed properly, empower people and systems to change for the better.

People enter into partnerships because they want to:

- find solutions to complex issues;
- make money or share resources;
- combine efforts to take advantage of opportunities;
- add value to products, services, programs or activities;
- increase lobbying ability, influence, credibility or standing;
- do more or better with less by sharing costs or skills;
- integrate ideas, activities and goals with others;
- reduce operational or management problems;
- enable the continuation of activities with reduced resources;
- attract expertise or specific knowledge or experience;
- make good use of shared knowledge, know-how and ideas; or
- eliminate duplication or overlap between similar groups.

There are advantages and drawbacks to partnerships but, when there is genuine support for the concept, the benefits greatly outweigh the disadvantages. The following outlines some of the opinions that community groups across Canada have put forward as the advantages and drawbacks related to partnerships.

Some of the Advantages:

- Creative solutions emerge from the differing perspectives which partnerships offer.
- Profits or profit margins increase, jobs or training opportunities are created, and wealth is generated.
- Partnerships often improve relationships between diverse groups, and they extend "buy in" or ownership to a greater number.
- Communities grow stronger with the participation and inclusion of many, and partnerships are a good way to enhance existing strengths and activities.
- Partnerships can sometimes be a good response to funding and program requirements when they make effective use of limited resources.
- Partnerships tend to bring about holistic approaches to community or organizational issues through discussion and the shared finding of solutions.
- Partnerships can promote, improve or enhance communication.
- Often partnerships involve people and organizations who might otherwise not participate.
- Partnerships can be a powerful vehicle to support change and transition.

Some of the Drawbacks:

- People don't always have the same values and interests, which can make agreement on partnership goals difficult.
- Financial losses can occur.
- Most partnerships have internal conflicts of one sort or another, and individuals may not have the training to identify issues or resolve conflict.
- There can be problematic power and status differences between the partners.
- Some partnerships do not have the commitment that is needed to hold it together under strain.
- The various individuals or organizations involved may have different authority levels and approval processes.
- The merging of differing "institutional cultures" isn't easy.
- Budgets sometimes decrease when they are being shared.
- Technology, although advanced, is seldom compatible between groups.
- Partners aren't always chosen carefully, and it's difficult to "de-partner".

Partnership Function and Structure

Examples abound where the strengths and talents from within a community, organization or industry, or among governments, have come together to produce spectacular results. While groups are pooling their efforts in exciting projects and activities, some of which lead to partnerships, many are lacking in the basic understanding of both partnership function and structure.

As these terms are often new for some, if not all partners, it is important to discuss the function of the partnership and whether the partnership activities will result in the need for a formal structure.

Function

Obviously, there are great differences in function between partnerships, even when they are doing similar things. Function relates to what the overall purpose of the partnership is, and how best to achieve the results desired.

The following models describe most types of community-based partnership functions:

- **Consultative or Advisory** - partnerships that are formed to receive public input around change or to gather ideas for future policies.
- **Contributory** - partnerships that are formed to benefit the work of a community or community organization; however, the founders set the objectives and the partners can agree to them or not.
- **Operational** - partnerships that are formed to set the strategic direction for a product or service; however, the operational implementation of the product or service is undertaken by one partner.
- **Collaborative** - partnerships that are formed to share resources, risks and decision-making. This is the type most often found in community-based partnerships.

Structure

There are different structures for different purposes and each partnership will need to determine what is the best structure for its particular function. Legal advice might be required to consider the various options and implications of those being considered.

Some partnerships might choose to be structured as limited partnerships, which are primarily designed for business development and profit making, while others might prefer the less formal partnerships which communities or their agencies usually undertake. For example, advisory partnerships often serve a specific purpose related to a particular topic or issue and have little to do with revenue, ownership or legal liability. Other partnerships may have a profit or profitability focus and will require a structure that resembles business or industry arrangements.

Three significant factors that will influence the partnership structure are:

- the degree of public risk,
- the amount and method of revenue generation, and
- ownership or legal considerations involved in profits or losses.

Generally speaking, the more revenue generated, the more likely the need for a structured and legal approach. When issues related to copyright, intellectual property, profit and loss, or legal liability enter into the picture, it is time to get legal advice and discuss both the function and structure of the partnership.

Degrees of Involvement

One of the strengths of community-based partnerships is that each partner or entity usually has a clear identity outside the partnership. The function and structure of the partnership will determine how much time and effort will be required from each partner. Based on these considerations, potential partners will choose, or not choose, to bring their skills and resources to the partnership.

The degree to which partners will contribute both time and skill will vary from group to group and individual to individual. Regardless of the function, structure or time involved, the partnership work is most often in addition to the regular work of the group or partnership members.

People in the partnership are not always involved to the same degree all of the time. Some may have less involvement as the alliance evolves, while others form the core group that is consistently active. Sub-groups, committees or task teams may develop from the original partnership group to undertake specific work in addition to the overall management of the partnership.

To keep focused under these conditions, the group should always remember what the partnership is about and what is reasonable to expect from people in that particular situation.

Lessons from Experience

- An essential first step in the creation of a partnership is the development of a shared understanding among all potential partners about what a partnership is and what a partnership is not.
- Partnerships are generally formed when there is agreement that working together will produce better results than working separately.
- Not everything that is done collaboratively is a partnership.
- There is an increasing interest in partnerships and numerous Canadian success stories from which we can learn.
- The array of partnerships is vast, ranging from small neighbourhood activities to complex multi-structured, profit-making ventures.
- Partnerships have different functions and structures, but each potential partner should clearly understand what the function and overall purpose is, as well as the commitment that will be required.

Points to Ponder

- What is your understanding of the term partnership?
- Why are you interested in forming a partnership?
- What are the advantages or drawbacks of forming a partnership?
- What would be the function and structure of the partnership?
- Are there groups or individuals who might be potential partnership members, and what degree of involvement might they have?

SECTION 2 -
PREPARING FOR A PARTNERSHIP

This section looks at the conditions and understandings needed to form an effective partnership foundation.

Conditions that support effective partnerships

Partnerships involve intentional choice and are but one way to work with others toward a common purpose. They are not the only way and, in some circumstances, they are not the best way. There are some important factors to consider as you explore the feasibility and advisability of forming a partnership.

These factors are:

- having common interests or concerns
- understanding your partnership environment,
- understanding what a partnership involves, and
- being open to doing things differently.

Before commencing the hard work of developing a partnership, explore these four factors to determine whether or not the partnership option is the best way to accomplish what you want to achieve.

Having Common Interests or Concerns

One of the first things to consider is whether or not there are other people who share your interest and concern.

This task may be an easy one, as partnerships often develop as a result of other relationships. In these situations there is a certain degree of trust or understanding already in place and, through the relationship itself, common interests and concerns have been identified. On the other hand, you may not have had opportunities to develop these kinds of connections, and you may be thinking about creating a partnership with people who have not traditionally thought of themselves as having anything in common.

Regardless of your particular situation, the first step is to make a list of those who might be interested and who may wish to work together to respond to specific opportunities or challenges. There may be significant diversity in the organizations and individuals you identify. The common factor is that there is shared interest around an opportunity, issue or activity.

Your initial list does not have to be long. You simply want to see if there is interest in discussing areas of mutual interest and whether it is worthwhile pursuing the interest beyond discussion. There are a variety of approaches that can be used to test the waters such as:

- phoning key people to determine if there is interest;
- meeting potential partners for coffee or lunch and having informal conversations;
- following up on ideas or issues raised during the course of other activities; or
- pulling together a brainstorming, focus or discussion group.

Remember you are still a long way from deciding that you want to create a partnership or determining the particular focus of a partnership if one is desired. You are, at this point, simply seeing if there is common ground and an interest in the idea of working together. You may find through your initial contacts that:

- there are other key people that you want to talk to about a potential partnership;
- someone else has started a process or action about the same thing; or
- there is little interest in pursuing a partnership at this time.

If, however, there is interest in working together, you can begin to explore the potential of using a partnership as the right vehicle for your efforts.

INCLUDING PEOPLE IN PARTNERSHIPS

We tend to choose people for partnerships based on whom we know, whom we know about or whom we know has resources. There's nothing wrong with this; however, there are other things that should be considered.

The following are considerations for membership:

- Invite people from different sectors who have different backgrounds, interests and abilities. Try to avoid just having non-profits working with non-profits, business with business and government with government. Having a variety of different cultures, values and ways of approaching things makes for a more dynamic partnership.

- Include members who may be the end users or who the partnership will directly affect. They know what they need and involvement in the partnership will help with ownership later on.

- Don't make the group too large, as it becomes impossible to get things done. Groups that are too small are easier to get agreement in but are not usually representative. Somewhere between 10 and 15 people seems to be a good operative size.

- Pick people with a commitment to the idea of partnering and those who can make a contribution. Some of these people may have high-profile positions or be famous, so they may be too busy to be a regular part of the partnership; however, their initial involvement or endorsement could attract the kind of people the partnership needs.

- Including family members or close friends is neither good nor bad, but it is important to be aware that these types of relationships will have an effect on the group. As an example, the work of the group will be discussed outside of the partnership and those who are closely involved with each other may move at a different pace than the others, or come to conclusions without input from the rest of the group.

Understanding your partnership environment

Partnerships are not created in a vacuum. They are created within a dynamic environment that involves individuals, organizations and often communities. Understanding whether or not you are working in a supportive environment is very important as you explore the possibility of creating a partnership. Consider, for example, what else is currently underway to respond to the issue or opportunity that you want your partnership to address, the experience of potential partners and the perceptions of others from within your community or organization.

Before you decide to take the partnership route you should have a clear sense of what is already taking place related to the opportunity or concern you have identified. Your partnership should build upon and add value to what exists. You may not want it to compete with existing activities. Some potential partnership members may want a very thorough discussion on this matter before they can make a commitment. Undertaking one or more of the following can help to develop this understanding:

- tapping into the knowledge of the key people you have identified as potential partnership members;
- phoning government departments that are addressing the matter as part of their mandate and finding out what activities they are involved in and what partnerships they may have created;
- contacting funding agencies such as the United Way or foundations to see if they are aware of activities in your area of interest;

- contacting private sector leaders who may have involvement or expertise in the issue you are pursuing;
- going to the library to see if there is a directory of community agencies that might identify helpful contacts; and/or
- undertaking a search on the issue through the Internet.

The particular technique you use will depend on the issue being addressed. The process does not need to be onerous, as understanding all the details is not necessary. Initially, a broad-based understanding of what is already underway is all that is required to help decide whether a partnership is the best approach.

Considering potential partners

People have different values and beliefs, and they bring them into partnerships. As debates about these items often leave little room for compromise, it is important to understand each partner's beliefs and establish values early in the relationship. Each individual has a set of personal values, which may be reflected in the partnership; however, there is rarely a direct reflection of all the values of any one person in the collective partnership group.

The history that potential partners have with one another will have an impact on the partnership. A positive or a negative history may carry over into the new relationship. It is preferable to discuss any previous history, good or bad, with potential partners to make the best use of the experiences gained and to avoid negative experiences. This should be approached as a constructive exercise to let others know of any past or present working relationships in place between individuals or organizations.

Why Do People Join Partnerships?

People become and stay involved in partnerships when:

- they understand and support the cause or purposes of the partnership;
- there is something in it for them or they can see how they can help;
- they trust the motivation of all the members;
- they understand how it will be supported by their organization;
- they feel competent and able to do what is needed; and
- they have the time, interest and desire to participate.

People are often reluctant to join into partnerships when:

- they are too busy;
- there is not enough in it for them;
- they do not trust the motivation of all the members;
- they have been directed or sent into the partnership without support;
- they feel they don't have the skills to do a good job; or
- they are not sure that the benefits outweigh the risks.

People Outside the Partnership

As you create energy around forming a partnership, it is important to recognize that what the potential partnership is focused upon and how others perceive it may be two different things. You need to be sensitive to the fact that others, outside the process, will be interested and watching what is happening with the discussion of the joining of forces in a partnership. They are watching from a different vantage point than those directly involved. Clear communication and inclusion can avoid negative or inaccurate perceptions. Positive perceptions can be influenced in the same way, with clear communication and inclusion.

Understanding what a partnership involves

Partnerships are not for everybody nor are they always the best means to accomplish what needs to be done. A common understanding of what a partnership is and what it can and cannot do is very important. As partnerships almost always involve shared ownership, responsibility and decision-making, it is important that those considering a partnership understand the parameters of each of these aspects.

The word partnership is frequently used to describe a very wide range of collaborative efforts and activity. If you have identified a group of people with an interest in working together, be sure that you share a common understanding of what the partnership option involves.

As a group you need to determine the following:

- How serious is the interest in working together?
- What is the focus of the partnership activity?
- Is there a willingness to share authority, credit and responsibility?
- Are the anticipated or desired results clear?
- Is there interest in contributing resources to the partnership?

Power, Self-Interest and Resources

Power, self-interest and resources are three factors fundamental to establishing a partnership. Before a partnership is established, it is important to understand who has power or where it is shifting, what personal or professional interests will be served and what resources will need to be applied to the partnership.

Power

Partnerships are about power: individual power and collective power. For some, the word power has a negative connotation and implies control, force or undue influence. Some think of power based on gender, race or rank. Power also has a very positive side in the sense of strength, wisdom and ability. Power is always present and is rarely equal. It is important to recognize this fact as you consider creating a partnership. A successful partnership values and openly acknowledges the different types of power that each individual or organization brings. By acknowledging it, the partnership is then able to deal with any issues or conflicts that arise from the use of power.

Self-Interest

Partnerships should and do serve our self-interests, whether on a personal or professional level. There is always something in it for us, and knowing what it is ahead of time, and being able to talk about it openly, helps build a partnership. Self-interest is the primary motivation for people and should be acknowledged. What each individual may gain as a result of the partnership will vary, but it could include things such as recognition, financial reward, connections, advancement, good will, influence or inclusion. We should encourage discussions about how a potential partnership serves our own personal interests as well as those of our organizations.

If you are seriously considering a partnership, a useful exercise is to ask each person in the partnership why they want to be a member and what they hope to achieve for themselves or their organization. The answers will go a long way to building trust and mutual understanding.

Resources

Everyone has resources, although being willing or able to contribute them to the partnership is another matter. Sometimes partners or potential partners are unable to provide what is needed, regardless of the expectation. It is important to do a "reality check" about reasonable expectations should the partnership proceed. Time, expertise and funds are not automatically contributed when a partnership has been formed and people have agreed to be included. Assumptions need to be articulated as part of the discussion about the viability of a potential partnership. That way everyone is clear about what resource contribution can be made and what is or is not a resource that the partnership could use.

Being Open to Doing Things Differently

Forming a partnership involves bringing individuals and organizations together to create a new entity. Regardless of whether the partnership is simply a formalization of existing working relationships or one that brings people together for a different purpose, creating and sustaining a partnership is a challenge. New working relationships and new ways of getting things done will no doubt occur. Some changes will be anticipated, but others will evolve with the partnership and may not be foreseen.

Sharing power, risks and credit is easy to understand theoretically but, in practice, can be more difficult. Working in partnership often forces us to review our own assumptions about how things should be done. An openness to the fact that change will occur and that, at times, those involved may be challenged to do things differently is very important to the viability of the partnership. Creating a partnership does not mean "business as usual". It means you have committed to a different approach and structure for working with others to achieve a common purpose.

Are the conditions that support a partnership in place?

The factors described above outline the conditions that support an effective partnership. Before seriously considering forming a partnership you should determine if these factors are in place. To determine your partnership readiness, gather sufficient information to answer the following questions:

- Is there an identifiable group of individuals or organizations with a common interest or concern?
- Are those people interested in and able to work together?
- Do you believe that potential partnership members have a common understanding of what a partnership is or is not?
- Will the partnership being considered bring benefit and add real value to existing activities within the community?
- Are potential partnership members open to change and doing things differently?

If the answer is yes to all the above questions, the factors that will support a partnership are in place and the next step is to assess your own personal and organization partnership readiness as well as the readiness of the community in which the partnership will operate. The next sections address these issues.

If, however, the answers to some of the questions above are no, you will want to do some serious thinking about:

- whether the partnership structure is appropriate at this time; and/or
- whether you as an individual or organization want to put some time and energy into strengthening the partnership environment.

Remember that potential partners may never previously have had an opportunity to discuss whether or not there is an interest in working together or what a partnership option might require. You could choose to create an opportunity to discuss their interest in working together and learn more about the partnership option. Describing a similar partnership that worked well is one way to help build understanding.

STORY: A PARTNERSHIP EXAMPLE

A forest industry company set up a medium-sized mill and logging operation in a small town. The private sector firm had to work with local environmentalists, find trees to harvest in the middle of Aboriginal land claims and gain the support of a community that had a very small economic base and a large and primarily unskilled labour market. The company owner, government and the local First Nation negotiated land use and timber rights, while community groups were invited to consider how this industry might address local needs, beyond just jobs. A large multi-stakeholder partnership was the result, with members of government (federal, provincial, First Nation and municipal), community agencies, service clubs, the justice system and post-secondary schools involved.

Although the planning took several months, mutually beneficial goals were agreed to and everyone eventually brought some of their resources and needs to the table. They all had to share a bit of their power but, in the long run, each had more than they would have had if they had not worked together. Five years later, there was no further need for the original partnership group. As a result of the partnership, a community-owned development corporation had been established which continued generating revenue for community needs.

Personal, organizational and community assessment

If you believe that the general conditions are in place to support a partnership, a useful next step is to look at:

- personal partnership readiness by undertaking a self-assessment;
- the readiness of your organization by undertaking an organizational assessment; and
- the readiness of the community by undertaking a community assessment.

Experience tells us that time spent in the beginning, assessing the current realities and establishing a firm foundation, will be saved in the long run by greatly increasing the probability of success.

Partnership Readiness: Self-Assessment

Everyone has a past, a present and a future. Experiences from our past affect our present and our present has an impact on our future. In partnerships this can apply in both positive and negative terms. Most people are accustomed to having responsibility and recognition for their own actions and efforts, so teamwork may be a different experience. In preparing to enter a partnership, we, as individuals, should spend some time looking at our own attitudes and values about partnerships and teamwork. We have to examine our motivation and evaluate our needs and expectations.

You may wish to assess your current situation by answering the following questions about personal involvement in the partnership. Keep in mind that it may be difficult to answer some of these questions. More work may need to be done on your part, either before or during the partnership relationship.

- Why am I interested in this partnership? What is my motivation to be involved?
- Do I have the time it will take to be a productive member?
- Do I value teamwork and have a good attitude about shared responsibility?
- What skills and resources do I bring to the group?
- What will I require from my organization to be effective and feel supported?
- Are there any work or personal issues that might affect my partnership involvement (e.g. conflicts of interest, time constraints)?
- What (if any) unresolved conflicts, past history or baggage related to the partnership do I need to sort out?
- What personal and professional opportunities and advantages do I see?
- What fears or insecurities (if any) do I have about working with others in general?
- What fears or insecurities (if any) do I have about working with this particular group of organizations and individuals?
- Can I communicate and express my ideas, concerns and feelings in a group?
- Who or what am I representing? With what authority? Do others agree that I can represent them well?

Use the answers to the questions above to decide if there is a good fit between your personal goals, interests and motivation and the commitments and requirements of the partnership. It is better to honestly assess these issues in the exploratory stage of creating a partnership rather than after the partnership has been established.

Partnership Readiness: Organizational Assessment

Many organizations are beginning to think that partnerships may be the route to success and, given some of the changes taking place, they may even be seen as a necessity. Before entering into a partnership, it is important to ensure that the organization you represent is ready, willing and able to be a partner. One key issue faced by organizations is who to choose to represent them at the partnership table. What the partnership is addressing and what the organization needs or wants from the person representing it usually determines this.

Selecting someone who is available, has the skills and will do a good job for both the partnership and the organization is most desirable, as is knowing in advance how the organization will support its representative. As partnerships are sometimes considered secondary to the main work of the organization, it is useful to have ongoing communication about how both the representative and the partnership activities are doing. The following exercise might help sort some of this out.

As an organization, these things should be considered before entering a partnership:

- Does the organization's mandate fit with the primary interest of the proposed partnership?
- Are the organization's values compatible with the work that will be undertaken?
- What resources (e.g. time, money, materials, space, equipment) from the organization might be available for the partnership?
- Is there someone who can represent the organization in a responsible way, and can that person be spared at this time? How will the organization support their representative in the partnership?
- How will the partnership benefit the organization? How will the organization benefit the partnership?
- How much time will it take, and how will that time connect to the other activities of the organization?
- Is there any reason why the organization would not wish to be involved?

Use the answers to the questions above to decide if there is a good fit between the goals, interests and values of your organization and the commitments and requirements of a partnership. Again, it is better to assess these issues honestly in the exploratory stage of the partnership rather than after the partnership has been established.

Partnership Readiness: Community Assessment

Partnerships are sometimes formed with very little attention given to how prepared the community is to proceed or if the community context has been given appropriate thought. The partnership group and the host community need to be considered from the outset. The following exercise may be useful when addressing these two components.

Answer the following questions about the potential partnership as it relates to community readiness:

- Is there a community plan in place into which the partnership activities might fit?
- How do you know the partnership is needed?
- How do you know there is support for this partnership from the community, other organizations and the people who will most benefit from it? What form might this support take?
- How would the partnership benefit the community?
- Who are the individuals or community groups that might be interested and appropriate to have involved?
- What sort of resistance to the partnership (if any) might exist?
- Is the political climate favourable for this venture?
- Are there any regulations or governance matters to be considered?
- What are the implications to others doing similar things in the vicinity of the partnership?
- From the community's perspective, what is the best that will happen if all goes well? What is the worst?
- What are other initial factors that need to be considered?

STORY: ARE YOU READY?

Two government departments were working with a small urban community to deliver health services in partnership with several community-based health care agencies. Although everything seemed to be in order, it was difficult to get commitment from the health care workers who were going to provide the services. What hadn't been taken into account was the fact that the health care workers were not used to working in a community context. Most were still adjusting to being in an agency rather than the more familiar and structured environment of a hospital. They needed time to make the transition into the role of community contractors before they could be active in a partnership. Although the managers of the agencies and the two government departments were ready, the people who were actually going to do the work were not.

The partnership could not be developed until the health care workers were comfortable in their new roles. It took a bit of time, but it was worth waiting for, as they brought a whole new set of attitudes and ideas into the partnership, based on their experience and knowledge of people's needs.

Moving from exploration to commitment

Leadership

All groups need leaders. This is particularly true for partnerships. Good leaders will pull the group together, see it through the tough spots and encourage others to take on the role. Poor leadership usually causes a partnership to disband or fail. Leadership is a skill, which should be nurtured and developed within a partnership.

When the partnership option has been explored and the readiness assessments completed, a decision should be made about proceeding into the partnership. At this time it is important to determine who will lead the partnership process. You will need an individual who is committed to seeing the partnership through its initial development stage. The early stages of a partnership require someone with a strong vision for the partnership and the ability to motivate others.

Selecting the proper leader is critical to the future of the group. If your partnership does not have strong leadership, actively recruit an individual that can provide these skills. Long-term effectiveness is dependent on building strong leadership capacity throughout the process.

After the partnership has been established, it is a good idea to review the leadership again because, as the partnership develops, different leadership skills may be needed to operationalize the goals and maintain momentum. Right from the start, be open to the fact that each partner has different skills and leadership abilities. Create an environment where people can contribute to the partnership in a manner that maximizes their skills and abilities.

Communication

Some partnerships draw a lot of attention and create a multitude of relationships while reaching their goals. As a result, good communication is essential for success and should be emphasized inside and outside of the partnership, regardless of its size or scope.

There are three levels of communication that should be considered:

- within the partnership group;
- from the partnership group to the community; and
- from the community to the partnership group.

Partnerships often give and receive a lot of information. Appropriate and timely information sharing, while desirable, is somewhat more complicated than it used to be. Busy people often resort to saying "tell me what I need to know, when I need to know it and in a manner that will be useful". More information isn't better, nor is it a measure of appropriate communication. Quality in all things is especially true regarding communication. The skill is in being able to determine, from a large amount of information, what the main points are and what they might mean to various individuals -- without telling them what to think.

Communication should be clear, concise, timely and relevant. Providing information in an organized way and having someone in charge of it constitutes the beginning of a communication strategy. Most partnerships require a strategy or plan for communication and information-sharing.

The strategy should include:

- the day-to-day information for the partnership group;
- overview information for interested others -- such as a brochure or handout;
- specific information as required, for the media or for funding sources;
- very focused information for support and lobbying purposes; and
- information for the public or community at large.

STORY: COMMUNICATION

A partnership group in a small inner-city neighbourhood knew that communication was going to be a major problem even though distance was not. The factors that they had to consider were that many people in the community did not have telephones, had low levels of literacy and often spoke one of six languages other than English. When they addressed the issue of communication in the partnership, they were more concerned about this aspect than they were about how the group would communicate with each other. It took two meetings to figure out that the community's issues were also present in the partnership group. They solved it by having translators present and by going door-to-door to gain support and interest in what they were doing.

BEHAVIOURS THAT HINDER COMMUNICATION

- Advice giving.
- Blaming others -- e.g. "You should have called sooner".
- Changing the topic inappropriately. People often change the topic to cope with their own rising anxiety.
- Defensiveness.
- False reassurance.
- Judging the other person.
- Leading statements. Putting words in the other person's mouth.
- Moralizing -- a specific form of judging. Occurs when one judges another based on one's own values.
- Multiple questions -- e.g. "Where do you live? Is it an apartment and what is your neighbourhood like?"
- Over-use of close-ended questions.
- Parroting -- continual repetition of a person's phrases in an effort to paraphrase.
- Patronizing the person -- talking down to them, voice tones too sweet.
- Placating the person -- agreeing with everything, taking the blame for everything and avoiding "no".
- Rationalizing feelings -- finding an apparently reasonable excuse for having the feelings, to explain away whatever is being felt.
- Stumped silence -- both parties are stuck. Try to summarize what took place, comment on own confusion.
- "Why" questions -- imply that others should come up with the underlying motivations of their actions. The other may feel he or she is being tested. The questioner may be perceived as accusatory.

Lessons from Experience

- A partnership may be created to respond to a common problem or a shared opportunity.
- Specific conditions should be in place before considering a partnership.
- While at times finding common ground can involve considerable effort, at other times it may be a natural progression from some other activity.
- The more personal the contact, the better sense you will have of potential partners interest in forming a partnership.
- Partnerships without a genuine desire to work together, or those set up simply to access resources, are rarely healthy and can cause imbalance and dissatisfaction all around.
- Develop a good understanding of your personal readiness, as well as that of your organization and community. Ensure that you also take time to assess the partnership readiness.
- Do not assume that everyone interested in a partnership understands the commitments forming a partnership entails.
- Strong leadership and effective communication are essentials for a strong partnership.
- At the heart of effective communication is trust. If trust is not established easily within your partnership group, get outside assistance to help build it.

Points to Ponder

- What processes will you undertake to determine if the conditions are in place to support an effective partnership?
- What do the results of the self-assessment, organizational assessment and community assessment reveal?
- Is strong leadership in place to develop the partnership? How can you support and build upon the leadership skills within the partnership?
- How will you ensure that effective communication takes place throughout the life of the partnership?

SECTION 3 -
THE PARTNERSHIP PROCESS

In the preceding sections the issues of exploring the viability and desirability of a partnership were discussed. This section assumes that a decision has been made and that you are ready to proceed with developing the partnership.

Developing effective partnerships

Successful partnerships happen all the time. They don't have to be complicated, nor do they have to follow a set formula or pattern of development. Each partnership is unique and will evolve at its own pace. There are, however, three stages of a partnership development that need to be thought through and acted upon. Paying attention to each stage will ensure a more orderly approach to partnering and, ultimately, improve your effectiveness. These stages resemble a road map that will help you plan the best route for establishing, implementing and maintaining the partnership.

Stage 1: Initial Development

1. **Vision** – creating a common picture for the future.
2. **Goals** – identifying desired outcomes for the partnership.
3. **Understanding the Situation** - assessing the current situation.
4. **Commitment** - confirming the desire to work together and understanding what is involved.
5. **Implications** - considering the impact of the partnership and possible legal issues or questions.

Stage 2: Making It Happen

1. **Action Plans** - identifying the specific steps that are required to reach the goals of the partnership.
2. **Resources** - identifying the resources that are required and how they will be obtained.
3. **Roles and Responsibilities** - identifying who will do what.
4. **Capacity Building** - building upon the partnership's strengths and addressing areas of weakness.

Stage 3: Accountability and Future Directions

1. **Evaluation** - determining the success of partnership activities.
2. **Future Directions** - maintaining momentum and determining what needs to happen next.
3. **Revision, Renewal and Closure** - identifying how to adjust and move on or end the partnership.

Basically, there are certain steps to each stage of the partnership process. Although the steps within each stage may appear to be linear, in reality they can happen within a variety of orders with several things happening at once. For this reason it is wise to clearly identify where you are in the process to ensure that the steps related to each stage of the process are undertaken.

Stage 1 - Initial Development

In Stage 1 of the process you are developing the parameters for your partnership. The results you want to accomplish at the end of this stage are:

- A vision for the partnership
- A set of concrete goals
- An identification of partnership members who have a strong commitment to the partnership
- A clear understanding of the legal implications of forming a partnership

Creating A Vision for the Partnership

A vision is a picture of the ideal future, formed by considering the potential results of the partnership.

Visioning is an appropriate way to start the initial development of a partnership process. People who come together through a common community interest or concern are prone to simply discuss the problem or issue. Visioning encourages us to look at the positive (or ideal) and allows a bit of dreaming about the future. It defines where we want to go. We can more easily move to action when we have a better idea of what the future could potentially hold.

By describing what the future could look like as a result of the activities of the partnership, we are able to see the need for the effort it will take. A vision is simply a picture of the future based on the partnership being successful. A vision describes what is hoped for and valued.

Some partnership groups like to capture their vision in a one- or two-line vision statement that describes what the vision is all about. The vision statement is used to describe the one main theme of the work being done and must be supported by all members of the partnership.

Examples of vision statements are:

- *The children of our community will have a safe and fun place to play.*
- *Through our work, the quality of life in our community will be improved so that individuals, families and businesses will enjoy greater freedom and confidence to prepare for the future.*
- *Our business venture will be operating well, showing a healthy profit, and be recognized as a community leader in social enterprise and cooperation.*

After creating a vision, discuss what values and principles various members hold that might be desired for the partnership. Principles are statements of belief and form the framework for the way that the group will operate, focusing on what they support or believe in related to the goals.

STORY: VISION, GOALS AND ACTION

A small partnership group was planning their strategy. It became apparent very quickly that language had become a problem. Some people were familiar with a particular approach that used the terms "vision", "goals" and "action steps", while others were familiar with language around policy-driven objectives.

Although it took awhile to reach agreement, they worked it through until they were all talking about the same thing. They had to change the terms to common language that everyone understood. What they knew they needed, regardless of what they called it, was agreement on a common vision, the desired results and a process to reach them.

Creating Goals for the Partnership

Goals are clear, easy-to-understand statements of intent that will close the gap between where you are now and your vision.

If the vision paints a picture of where you want to go, then the goals identify the pathways or means to get there. Goals are broad statements of intent created by looking at where you are now (current situation) and at the vision (where you want to be) and asking what needs to be done to close the gap between the two. Goals address the question of what it will take to make the vision a reality. In Stage 2 of the partnership process you will develop action plans for each goal. Make sure that your goals can be achieved in a reasonable amount of time (two to three years at the longest) and that they are broad statements of intent. If you find that there are more than five to seven goals, you must ask yourself the following questions:

- Are our goals really statements of intent or have we slipped into answering "how to" questions?
- Do we need to review the goals we have created and identify priorities?
- Can we really take action in all the goal areas we have identified?

The vision and goals set the parameters for the partnership so you must ensure that the goals are achievable and meaningful to all partnership members.

Examples of goals are:

- *To build a playground with a sandbox, a slide and four swings.*
- *To develop a community plan that includes economic development, health, education, social, cultural, environmental, leadership and governance matters.*
- *To establish a business plan with a focus on community recognition.*

Understanding the Current Situation

In order to reach the partnership's goals you must understand the current situation. Determining the current situation in an organization or community is often called assessment. This type of information gathering often involves hard work but it will pay off in the long run. Knowing the existing strengths, weaknesses, opportunities and barriers helps to paint a picture of the community. It is an essential part of formulating meaningful partnership goals. Whether a partnership is small or large, having the basic information gives you a solid starting point.

The following analysis framework can be used to provide a clearer picture of the current situation.

S.W.O.T. ANALYSIS

Ask questions about the following:

S	STRENGTHS
W	WEAKNESSES
O	INTERNAL AND EXTERNAL OPPORTUNITIES
T	INTERNAL AND EXTERNAL THREATS

Information gathering can be undertaken in a number of ways, from the very simple and informal to very sophisticated and professional. Depending on the need and complexity of the situation, decisions should be made about who will undertake the work and what the information gathered will be used for.

Use existing information and previous studies if they are appropriate for your needs. Clarify, for all involved, what the information is going to be used for and who will have access to it. If the process is informal, make sure that it is not presented as solid research, evaluation or as being totally factual.

Confirming Partnership Commitment

Commitment involves reaching an agreement to work together.

Agreeing to work together is the foundation of a partnership. Often this step is missed because it is assumed that those who have been involved are committed. Creating the vision and goals establishes what is to be done. At this point in time it is very important to confirm membership and the commitment of members to proceed with the partnership. Members need to have a vision and goals in place before they can make this decision. Obtaining agreement does two things: it formalizes the participation of the various members; and it affirms that everyone is committed to move ahead with the goals as outlined. Agreement to move to Stage 2 of the process, "Making it Happen", indicates a commitment to proceed with the partnership.

Although a legal document is not always required, creating a written partnership agreement or letter of understanding that all members review and sign is a good idea. A partnership agreement ensures that effective communication has taken place and that a common understanding and commitment does exist. Some individuals who represent organizations may need such a document in order to get approval and endorsement from their organizations. The signing of an agreement or letter of understanding encourages individuals and organizations to think through the commitment that is being made and signals that this commitment should not be made lightly.

Selecting Partners

Partnerships should carefully select members based on their "stake" or vested interest in the vision and goals of the partnership. It is possible that some people involved in the vision and goal development process will decide that, although they are supportive of the partnership, they do not want to be members or partners. As well, it might be useful to review the partnership vision and goals and decide if certain individuals or organizations should be recruited to the partnership given their interest or responsibilities.

It is important to have a good mix of people; however, adding people for the sake of variety isn't helpful or fair to anyone. Ensure that, when recruiting potential partners, you explain why you are asking them to be involved and what would be expected from them. Involve people whose skills, commitment and credibility enhance the work of the partnership.

If you are joining an existing partnership remember that being the new person in a partnership is much like being the new kid on the block. If you've been asked to join a partnership because of the skills, expertise or resources you have, there may be some pressure on you to produce or perform. As a newcomer, you won't know the history or the "secrets" of the group, and it may take a while until you are sure about what is being said and done. On the other hand, having someone new brings an outsider's perspective to the group and an opportunity to have objective input and new ideas.

TIPS FOR BUILDING PARTNERSHIP COMMITMENT

- Explain what the partnership hopes to accomplish and why it is important.
- Discuss what would be gained for the organization or individual who may participate.
- Mention who else is involved or who will be involved and how their connections, skills, input or resources would be complementary to the group.
- Discuss the individual's or organization's interests and the match between what they have and what is needed. Then ask for a commitment of interest.
- Provide whatever information is needed to make a good decision.
- Tell the potential member what to expect from the group, and ask what he or she might be prepared to contribute.
- Supporting members of a partnership, once it is established, is a serious and important job. Providing convenient meeting times and places, considering any special needs they might have and not wasting their time, expertise or resources are major considerations and are often ignored.
- Training and skill development should be part of the support members receive as very few people have all the skills that they need to be effective in a partnership. Offering training makes good sense for the group itself and also shows an interest in the people involved.
- Equally important is having respect and providing opportunity for members to have input and really share their ideas.

Understanding the Implications of Partnerships

Understanding the implications means asking key questions about the legal issues and other impacts of forming a partnership.

As you develop a partnership it is important that all partnership members understand the implications of the partnership arrangement. For example, partners need to understand the time commitment required, the responsibility they will be asked to assume and the legal implications of the partnership.

Experience indicates that the one area that is not well understood is around legal issues that arise as a result of the partnership. Not all partnerships are the same but they all should have a common understanding of:

- the legal issues that individuals and/or organizations need to think through when considering the formation of a partnership;
- what makes a partnership legally binding;
- when, if at all, a lawyer is necessary in forming the partnership; and
- what, if any, conflicts of interest might be present.

Other matters requiring consideration are: whether intellectual property is involved; the liability of members as individuals and/or organizations, and the liability of the partnership as a whole; the impact on personal or professional credibility; the long-range implications to one's personal or professional life; copyright on materials; financial management; and dissolution of the partnership.

Lessons from Experience

- Following a partnership process makes the development of the partnership easier.
- All partners should be involved in describing the vision and setting the partnership goals.
- Seek outside advice or technical assistance if it is required.
- Assess the current situation to provide a starting point and a reality check.
- Clarify membership and what is expected from each person or organization and affirm interest and contribution. If there is no real agreement, return to the vision and goals, and clarify any areas that are problematic. If an individual does not wish to be involved, it is best to respect his or her wishes.
- Each member should understand the legal and other implications of forming a partnership since partnerships mean shared resources, power, risk and benefit.

Points to Ponder

- Does your partnership have a common vision and goals in place? If not, what process will you use to develop them?
- If a partnership vision and goals are in place, how do you know that they are supported and understood by all partnership members and the community?
- How will you maintain commitment to your vision and goals over time?
- Do you have a written partnership agreement or letter of understanding in place? If not, why not?
- Are there outstanding issues and concerns about creating the partnership that need to be discussed and resolved? How will you do this?
- What are the key legal issues and questions that need to be considered by your partnership? What process or expertise will you use to resolve these issues?

Stage 2: Making it Happen

The results you want to accomplish at the end of this stage of the process are:

- clear action plans related to each partnership goal;
- an identification of the resources available to the partnership and how they will be used;
- a clear understanding of the role and responsibilities of each partnership member; and
- a strategy for building upon the capacity within the partnership.

This stage of the partnership process moves the partnership from theory to practice. In Stage 1 of the process you took the steps needed to clearly establish the parameters of the partnership. In Stage 2 you are taking the steps needed to implement the partnership -- that is, to make it happen.

Developing Action Plans for Partnership Goals

Action plans outline concrete actions that are needed to achieve each partnership goal. They provide an overview of what is going to be done and how.

Action planning involves determining what steps should be taken to achieve each partnership goal. You are breaking down the goals, which are simply general statements of intent, into clearly identifiable and do-able pieces. Goals set the direction and the action plans serve as detailed maps of what specific actions are going to be taken. You most likely will have more than one action for each goal.

An action plan identifies the steps to be taken and resources needed to get from where you are now to where you want to be for each goal. Specifically, the action plan should include what is to be done, by whom, by what method and when, as well as considering any monitoring or evaluation requirements.

Develop an action plan by:

- reviewing your understanding of the current situation;
- identifying concrete steps that close the gaps between the current situation and reaching the particular goal;
- determining the resources that are needed to undertake the actions;
- identifying whom will take lead responsibility for undertaking each action;
- estimating the timeframe required to complete the tasks or actions;
- identifying any support that may be required; and
- establishing key milestones or decision points to help you assess whether or not the action plan is on track.

Keys to Successful Action Planning

The following are useful considerations in creating an action plan. The plan or action should be:

SPECIFIC	Develop concrete ideas for action related to each goal. Make a step-by-step action plan.
MEASURABLE	How do you know when each step is completed? How do you keep an accurate record?
ACHIEVABLE	Are you prepared and can you meet this challenge? Is it a sensible plan?
REALISTIC	Are you able to attain your goal through reasonable efforts?
TIME-TARGETED	When can each step be started and completed?
SUPPORTED	Who could help? How could they help?

Action Plan Summary

Most partnerships have more ideas for action and projects than they can accomplish or finance. Be sure to review your ideas for action and select the ones that are most feasible and that will produce the most significant impact in terms of reaching your goals.

The following Action Planning Summary Sheet is provided to assist you to summarize the actions you develop for each goal. Before any final approvals are given, it is important to look at all the actions together to determine whether or not you have created a realistic plan. Remember it is better to do a few things well than several things poorly.

Action Planning Summary Sheet

Goal:

Actions -- What needs to be done?

Who will do it?

What resources are required?

What support is needed?

When will it be done? What is the time frame?

Key Decision Points/Milestones:

Resources

Resources include human, financial and infrastructure matters.

Basically, resources are what are required to get things done. Resources take on different shape and meaning in each partnership, although typically they involve human, financial and infrastructure considerations. Budget constraints often have us doing more with less but this does not mean doing more with nothing. It can mean a bit of borrowing and sharing, or it can mean altering unrealistic expectations and outdated standards that have become the norm. For example, a partnership may or may not need paid staff, office space or stationery. Deciding what is critical to the success of the partnership is the first step. Formulating a resource plan is the next.

A resource plan should address the physical, financial and human resource requirements of the partnership. Human resource needs might include having a skilled facilitator, appointing staff where needed, establishing and funding a committee, or acquiring help to put together a training plan for capacity building. Physical needs, such as a meeting place, an office or building, equipment and operating material, are also important resource considerations. These are sometimes called infrastructure. It is important to determine what is absolutely necessary (as well as what would be nice to have) and from where any of it will come.

You will need financial resources to pay salary and infrastructure costs so you will also need to determine the financial resources necessary to undertake the projects and activities of the partnership.

Consolidating the resource requirements that have been identified in your action plans will address this issue.

As you develop your resource plan:

- Know what you need and what you've got, not just what you'd like to have.
- Don't assume that "the other" partner will bring the money or resources, even if that has traditionally been the case.
- Remember resources include people, money, space, equipment or other real items needed to operate the partnership.

Roles and Responsibilities

Roles and responsibilities address the issue of who will do what for the overall operation of the partnership.

All partnerships need structures and processes that help to clarify who will be in charge of what and how things will be done. Establishing roles and responsibilities is a natural outcome of preparing action plans and should, therefore, take place early in the planning process.

This discussion should cover not only who will do the things outlined in the action plan but also how the group will conduct its business, what is acceptable within the partnership group and what is not.

In order to clearly define roles and responsibility it is suggested that you:

- Develop role and responsibility statements for key board or organizational positions such as chairperson, recorder and treasurer, so that the partnership group is organized.
- Set the ground rules. Establish group norms.
- Determine how decisions will be made.
- Ensure individual partners understand their responsibilities (e.g. attending meetings, reviewing materials, following through on commitments).
- Form any required subgroups or committees.
- Plan meetings well in advance, circulate the agenda in advance and keep minutes concise.

Remember that partnerships almost always involve new ways of doing things. Make sure that all partners understand how decisions will be made and how conflict will be resolved. Make sure that, as a partnership group, you are not making assumptions about the role, commitments or responsibilities of particular partners. If you assume a partnership member will provide space or has financial resources to contribute, it is important to clarify this by asking questions and confirming assumptions. Effective communication is a critical element to an effective partnership.

Ground Rules - A Code of Conduct

Reaching agreement on how to interact with each other in a partnership is important to success. Establishing ground rules that outline acceptable and unacceptable behaviors for members right at the beginning will help avoid misunderstandings. Having "rules" sets the tone and provides a code of ethics or behaviors that then becomes the acceptable way of doing things. There should be agreement by all involved on the ground rules, and this should precede any other process matters.

It's better to do this before there is a problem, rather than appearing to be making up the rules as you go along, or reacting to each issue as it surfaces. Some groups find it useful to do an exercise that looks at "what if" certain behaviors happen. Examples include such things as the same member being absent for most meetings or individuals not doing their share of the work. They consider all the possibilities and come up with solutions or ways of handling difficult situations long before they happen. That way they know what they would do, having had the opportunity to think about it without the pressure of the problem or issue facing them.

Some ground rules you may wish to consider are:

- We all have manners. Use them.
- Freely share any information you feel would be helpful.
- Deal with issues immediately. Don't use delaying as a tactic to avoid hard decisions.
- Don't use "tricks" to win a struggle, and don't resort to backstabbing or other unethical behavior.
- Power plays and manipulation will not be tolerated.
- Only those who have the responsibility for communication should speak for or on behalf of the group.

- Be brief, keep things simple and keep focused.
- Explaining the source of your information and/or opinions often helps to validate them.
- Expert or outside assistance and information will be sought when needed.

Remember that working together involves negotiating and reaching compromise on what needs to be done, by whom and in what manner. This becomes very difficult when not all partners are considered to be equal or when their contributions are not readily visible or understood at the onset. Not all contributions will be financial. What we refer to as an "in kind" contribution may surpass the familiar donations of office space, administrative staff support, expertise or equipment. Although the contribution of every partner may not be equal, every contribution will help create success. Each partnership should know its members' strengths and weaknesses as well as their ability or limitations around involvement and contribution.

Capacity Building

The ability of individuals, groups and organizations to plan, undertake and manage a partnership on their own is referred to as capacity.

Capacity is simply the ways and means needed to do what has to be done. It is much broader than simply skills, people and plans. It includes commitment, resources and all that is brought to bear on a process to make it successful. Most often capacity is referred to as including the following components:

- people who are willing to be involved;
- skills, knowledge and abilities;
- the ability to identify and access opportunities;
- the motivation and the wherewithal to carry out initiatives;
- infrastructure, supportive institutions and physical resources;
- leadership and the structures needed for participation;
- economic and financial resources; and
- enabling policies and systems.

Capacity building acknowledges and builds upon the existing strengths and abilities within the partnership. It takes leadership, time and intentional effort to build capacity. It may also require the support of individuals with expertise and/or money for training. An indication that capacity is developing within a partnership is that people are active, interested and participating in what is going on. They may also be questioning, challenging and debating -- but they will be debating what should be done, not complaining that nothing will ever change.

To develop capacity within the partnership you will need to:

- assess everything required to carry out the plan, role or action;
- understand the skills and knowledge required for the various roles and action plans;
- identify the gaps;

- develop strategies for filling the gaps; and
- develop strategies to support individuals while they learn to apply new skills and knowledge.

Commonly used strategies for the development of skills and knowledge are:

- training workshops or learning circles;
- training opportunities offered within the community;
- mentoring and coaching;
- self-directed learning; and
- training on the job.

PARTNERSHIP ORGANIZING IDEAS

Start where people are.

Focus on the positive -- work to change the negative.

Look for common ground -- issues bring peopl together.

Find people who are ready and keen to help - listen to them. There are often gems of wisdon even in the absurd.

Use your networks inside and outside the partnership.

Build partnership by shared interests, values, i and vision.

Have a plan that is easy to understand, initiate evaluate.

Keep people informed and involved. Tell them what's going on and why.

Recognize and thank all involved, even yourse

Make mistakes, as that's where the real learnin occurs.

Don't sweat the little things; look at the big pic and remember the things you've done well.

Celebrate and share some fun together.

Lessons from Experience

- A vision and goals are not enough to sustain a partnership over time. Concrete action plans that outline how each goal is to be achieved are needed. The vision, goals and action plans should be consolidated into one document. This document should be used as the key tool for managing the partnership and ensuring that it produces results.
- In partnership arrangements there are almost always costs, resulting in the need for revenue. Sufficient funds should be in place. If they are not, a plan to acquire them needs to be developed for both the operation of the partnership itself and the partnership goals. Each is separate and distinct but should be addressed as part of the overall resource plan.
- Clearly define individual roles and responsibilities. It is important to recognize that these could change over time. An annual assessment of roles, responsibilities and contribution is advisable.
- Remember that partnerships involve a variety of interests and concerns so debate and/or conflict are often part of the partnership process. Be sure to build capacity to make good decisions and resolve conflict.
- Sometimes we fail to identify and build on capacity because it seems to be a daunting experience and a somewhat complex task. Be sure to take a developmental approach to capacity building, linking it to the vision, goals and action plans of the partnership.

Points to Ponder

- What are the concrete actions that must be taken to achieve the partnership goals?
- What resources are required to sustain the partnership? Are these resources in place? If not, how will you acquire the resources?
- How are you going to monitor the implementation of your action plans?
- Are the roles, responsibilities and the commitment needed by partners clearly understood?
- Are there unspoken expectations about partnership contributions that need to be discussed?
- Does the partnership have the capacity to make good decisions and resolve conflicts? If not, how will this capacity be built?

Stage 3: Evaluation and setting future directions

In this stage of the partnership process you are taking stock of current activities and looking forward and making decisions about the future of the partnership. The results you want to achieve by the end of this stage in the process are:

- a clear sense of successes and failures;
- an agreed-to process for sharing success and acknowledging failures;
- an understanding of the directions the partnership will pursue in the future; and
- a commitment to revise and/or renew your partnership, or to bring it to a conclusion.

Evaluation

Evaluation involves assessing progress and accomplishments.

Evaluation is the step in the process that allows a partnership to assess its progress and to measure success. Although it usually appears as one of the final steps in the process, it really should be considered and built in right at the beginning. Evaluation should not be seen as threatening but, rather, as a means for ensuring that you are achieving what you want to achieve. Understanding success helps you build upon it. Understanding failure helps you avoid making the same mistakes again.

The foundation for evaluation and for keeping the partnership on track is knowing what success looks like for each goal. Being able to clearly define progress and success is important, not only for the partnership itself, but for others who are interested in and supportive of the work being done. In some instances there are resources available to hire outside help, although this is not always required if you know what success looks like and how you will be able to measure progress toward it.

As you consider evaluation issues:

- Build evaluation criteria right into the goals. That way you'll know when you are successful.
- Remember evaluation is ongoing, not done just at the end of the work or project. Measure and modify as you go along.
- Include measuring the partnership's progress in addition to the results achieved through the action plan.
- If things aren't going according to plan, fix the problem or revise the plan.
- Use the evaluation results for planning and promotion of the partnership.

When outside funding is involved, such as with foundation grants or government programs, there are likely other levels of evaluation that need to be considered. One is in the form of monitoring or overseeing the general activities and goals of the partnership. Any funder is going to want to know that funded activities have actually taken place. In addition, the funder may have assessment or evaluation criteria that must be built into the design of the partnership.

With government funding, there are audits and specific evaluations on the use of the funds and measures for success or tracking systems.

Try to determine in advance what the expectations are, what systems are to be used for data gathering and what measures of success are important to the funders. Also try to establish what the expectations are related to evaluation, monitoring and audit, based on the funders being partners rather than simply funders.

This usually does not cause any difficulty; however, it should be discussed and agreed to early in the relationship so that there are no surprises and data can be collected as and when needed.

Setting Future Directions

Looking at the current situation and the results of partnership helps to determine the focus of activity for the future.

The creation and on-going management of the partnership is a dynamic process. On a yearly basis it is advisable to look at three important questions:

- What have we achieved in the last year?
- What do we want to achieve in the next year?
- Do we need to improve the processes or anything else we have put in place?

To answer these questions you will need to review the vision, goals, action plans and the partnership environment. You need to assess whether the action plans are:

- being effectively implemented;
- having the impact you hoped for; and
- continuing to be relevant, or whether new actions are needed.

The responses to these questions may cause you to re-organize the approach being taken to the work, affirm you are on track or cause you to do some further thinking about what needs to be done to achieve the vision and goals. This type of annual review is healthy and necessary for an effective partnership and to set direction for the future.

REVIEWING YOUR PARTNERSHIP - AN OVERVIEW

It may be useful, as a group, to discuss each item on the following list in order to assess the overall knowledge and foundation of your partnership and to ensure that you are still on track with the partnership direction.

How well do we compare to effective partnerships? Do we know the answers to each item? In effective partnerships, the partners:

- Know why they are "together" - VISION AND GOALS
- Know when to be separate - IDENTITY
- Know what's in it for them - PURPOSE
- Can easily explain the partnership - CLARITY
- Have good manners and share information well - COMMUNICATION
- Know what's been lost or gained - POWER SHIFTS
- Acknowledge past damages and false images - HISTORY
- Create a "partner friendly" environment - TRUST
- Know who is in charge of what - ROLES
- Know where the buck stops - RESPONSIBILITY
- Build on strengths - CAPACITY BUILDING AND TRAINING
- Create themselves - INNOVATION
- Promote what they are doing - MARKETING

Revision, Renewal and Closure

This involves re-adjustments, fine-tuning, assessing and making changes to the partnership as well as closure of the partnership when necessary.

In addition to looking at what the partnership has accomplished and what it might do in the future, it is important to assess the effectiveness of the partnership vehicle you have created. It is important to be satisfied with the way the partnership is working and the processes that have been put in place. In assessing this, consider revision, renewal or closure when appropriate.

Revision

There would be no point in assessing progress or evaluating success if we were not going to act on it. Revising any aspect of the partnership can happen at any time; however, it is important to make sure that the opportunity exists to make changes. Tinkering with various parts of the action plan, when required, is possible and even encouraged; however, bigger changes such as to the vision or goals require careful thought and should only be done based on concrete data and a proven need.

Stress is one of the natural reactions to change and transition, and partnerships are not without it, even when they are not restructuring. During a restructure, however, the advantages of having some history with each other and familiarity with the partnership helps to balance out the uncertainty of change.

When the partnership is a full-time initiative, restructuring becomes the day-to-day business of the group in addition to the actual activities of the partnership. For partnerships whose members or partners are only involved on a part-time basis, restructuring can take longer and be very disjointed.

Renewal

A partnership, like any other entity that has a purpose and membership, may or may not change over time. Occasionally, the partnership may need to be reviewed to determine if it makes sense to renew the agreement. This most often happens at the completion of partnership goals. If the goals have not been met within the anticipated timeframe, or if the needs are ongoing, the partnership may be renewed. At the point of renewal, either major or minor changes may take place. Major changes are a partnership revision. Minor changes don't cause a great deal of concern to the overall partnership and can be integrated into a renewal agreement.

STORY: LEADERSHIP AND RENEWAL

A long-standing and very effective partnership between industry, education and several community agencies had had the same people involved for over ten years. They had strong leadership, a clear vision and many successes to their credit. Within a one-year period, six of the ten original members had left the partnership, most of them having either retired or been transferred into different jobs.

Unfortunately, they had not planned for future leadership or succession and had not shared information very well among their organizations. They had to scramble to fill the roles and keep the knowledge levels high, even though gaining experience was going to take longer.

One of the first things they did with the newer and younger group was to create a leadership succession plan.

Closure - Ending a Partnership

Partnerships have endings, which are most often positive and satisfying. Some partnerships go on for a very long time, having far-reaching or long-term goals. Other partnerships, however, will have shorter-term goals and will want to celebrate a job well-done and bring the partnership to an end. No matter what the situation, endings should have the same attention paid to them as beginnings. Care should be taken to acknowledge the results of the partnership, the various individuals who have made a difference, and the effort that the group itself has made. Recognition and celebration are the order of the day, probably involving some tears and some laughter.

Throughout the life of the partnership, strong bonds are formed between various individuals and with the group as a whole. It helps to acknowledge that the initial basis for the friendships, the partnership itself, may be ending, but that the friendships don't have to. People who have worked together in one partnership will often work together in another one. They will bring with them their skills, experience and the knowledge that they can work together.

CLOSING A PARTNERSHIP

The following are some suggestions about formalizing and recognizing closure and endings to partnerships. Ask the members of the partnership to consider the following:

- What have been the major successes of the partnership?
- What can be done to acknowledge all the hard work?
- Recall what each person or organization contributed.
- Who needs to be recognized within the group and outside?
- What needs to be conveyed outside the partnership regarding the ending or closure of the partnership?
- How will you capture the history of the partnership?
- Solicit ideas about a celebration or recognition party or ceremony.
- Pick a time, place and event to which all can agree.
- Who should be included?
- Celebrate and prepare to move on!

A FINAL CHECK LIST FOR PARTNERSHIPS

Answer "Yes" or "No" to the following.
As a partnership group, we have:

- Created a Vision _____
- Defined Our Goals _____
- Established Membership _____
- Designed a Communication Strategy _____
- Designed an Agreement and Achieved Commitment _____
- Developed an Action Plan for Our Goals _____
- Established Roles and Responsibilities _____
- Created Group Norms or Ground Rules _____
- Established Information and Reporting Systems _____
- Developed Resource Plans _____
- Established Evaluation and Revision Mechanisms _____
- Discussed Renewal/Revision/ Closure of the Partnership _____

Lessons from Experience

- Evaluating results and impact is important. Be sure there is a clear understanding of what success looks like and a concrete way for evaluating it over time.
- Action plans must be established and then reviewed, revised or replaced if they are not producing the results for which you had hoped.
- Remember partnerships operate in a dynamic environment. Make sure you are aware of changes within your environment, and that you confirm that your goals and action plans remain relevant and meaningful.
- Assess the effectiveness of your partnership structure and process on a regular basis. Revision and renewal can take place at any time, although it generally takes place after an assessment or evaluation.
- New people and ideas should always be welcomed, and partnerships should make an effort to have a way for people to join. Any change in the personalities in the partnership will change the dynamics of the group.

Points to Ponder

- What will success look like for your partnership?
- How will you measure and evaluate both the partnership and its accomplishments?
- How will your partnership plan for the future?
- How can you create a partnership culture that enables a frank and open discussion on successes, failures and needed improvements?

SECTION 4 -
KNOWLEDGE, ATTITUDE AND SKILLS

This section considers the knowledge, attitudes and skills required for effective partnerships.

In order to effectively establish and maintain a partnership, basic skills and knowledge are needed along with a positive mind-set or attitude. Consider what you need to believe and feel about the partnership (attitude), what you need to know (knowledge) and what you need to be able to do (skills). These three factors are critical to the success of the partnership. People come into partnerships with a variety of skills and valuable experience that can be applied to the partnership process. While the partnership group itself should have solid skills and knowledge, each partner does not have to possess all or even the same skills or knowledge, or even have the same attitudes. Differences are sometimes helpful.

Knowledge

Knowledge of one or more aspects of the partnering process (or related processes) is very beneficial. Much of what we know from our work and personal life has application to a partnership. For example, having knowledge of group dynamics, marketing, law, business development, grant writing, or the basics of economic or social development are all areas that are valuable. Also important is a solid knowledge of the business of the partnership, the environment in which the partnership will operate and the processes needed to develop and maintain the partnership. Since many partnerships are based in a community context, having a fundamental knowledge of community development, capacity building and resource or financial management is equally useful.

Although no one person has to have all of this knowledge, collectively the partnership should know what it needs to know, and where to access what is missing. We are constantly increasing our knowledge base, and partnerships are an excellent place to do this, but remember that knowledge in itself is not very helpful to others until it is applied.

Attitude

Our attitude about ourselves, the partnership in general and the benefit that will be derived from it all play a big role in achieving success. Attitudes are a reflection of the values we hold and the principles we believe in. Although attitude shapes all decisions and actions, it is difficult to define as it consists of many qualities and beliefs that are non-tangible.

Although we often associate attitude with an individual person, groups and organizations can have attitudes too. When we talk about an organization or group's attitude, however, it is sometimes referred to as the group's culture or the corporate culture of an organization.

To be successful in a partnership, experience tells us that the attitudes needed are: respect for the people involved and the goals of the partnership; a strong sense of commitment; openness to working collaboratively; patience and perseverance; the ability to take risks and trust; and self-confidence.

The more value we see in the partnership, the better our attitude is and the better the partnership will progress. The quality of the partnership, to a large degree, is dependent on attitudes, values and perceptions as much as the skills and knowledge that are brought to it.

Skills

Skills are what it takes to move from theory, knowledge and attitude to action. Often called abilities, skills involve the performance of mental or physical tasks. They are learned, measurable and repeatable.

There are many skills involved in partnerships and, as with knowledge, no one person has to have all of the skills. Each partnership will require different skills at different times, some that the partnership will have within it, others that may have to be obtained from outside.

Basic Skills Needed For Partnering

Although each partnership is unique, when it comes to the basic or necessary skills, there are similarities. Partnerships share a common need for the skills listed below. A brief description of each of these skills follows.

- Managing Partnerships
- Negotiation Skills
- Group Processes and Team Building
- Planning Skills
- Evaluation Skills
- Problem Solving and Conflict Resolution
- Time Management
- Financial Management
- Managing Outside Help
- Working With Volunteers
- Stress Management

Managing Partnerships

Managing a partnership involves a number of different skills. In order to effectively start, maintain and conclude partnerships, traditional skills such as strategic, financial, human resource and operational planning are required. Good management is good leadership. This means understanding group facilitation, having the ability to work with diverse interests, collective decision-making, conflict resolution, anticipation of issues and opportunities, plus the skills needed for building support, energy and motivation.

These skills in and of themselves may not be enough. Depending on the partnership, a solid knowledge of the environment or the context in which the partnership is operating can also be crucial. An individual may have many of the management skills listed above, however, using them in a partnership context could mean using them in a different way. Acquiring management skills for partnerships is very different from acquiring management skills for other situations and can best be sought in training designed specifically for partnerships, teams or boards.

Negotiation Skills

Negotiation skills will serve you well in a partnership. When diverse groups or interests come together to decide on common goals and processes and to take action together, negotiating is fundamental to reaching agreement. Negotiating requires effective communication and joint problem-solving skills. The desire in negotiation is to create a "win-win" situation or, if that is not possible, to create a situation where all members can live with the decision or action taken. Partners who perceive that they have been forced to concede, or who feel that they have not been listened to, generally do not serve the partnership well. To be effective in negotiating you must have the ability to:

- identify the issue or problem,
- look at options and alternatives,
- help individuals understand the views of others,
- break the impasse if discussions get bogged down,
- manage conflict when it occurs,
- help find common ground,
- assist members to recognize agreement when it happens, and
- ensure that everyone understands the agreement.

Group Process and Team Building

Partnerships are built on good relationships and group dynamics, which take skills such as facilitation, listening and conflict resolution. Strong partnerships create an atmosphere where team building and trust will flourish. There is no one process or approach that will be right for all situations, and there is a very wide range of techniques that can and should be used. Team building is inclusive and makes people comfortable and feel that they belong. The more experience you have in working with groups, the better your skills will be in this area. Being able to "read" the group, or knowing what is going on without being told, is a skill that comes with experience and is essential to building healthy relationships.

Planning Skills

Planning is a tool that assists in managing and directing change, and planning skills help move the group from general intent to actual action. Planning occurs at many levels in partnerships, right from creating the vision to evaluating success. There are all different types of planning. For example, long-range planning, as in visioning, is sometimes called strategic planning. Turning goals into action and deciding what needs to be done is operational planning.

Planning takes time and must be valued in order to do it properly. Often, in our hurry to get things done, we do not pay enough attention to planning. This is like starting off on a trip to a new place without a map. Having a plan helps us see where we are going and how we will get there. It's a good thing to fall back on when things get tough or confusing.

Sometimes, when things aren't going according to plan, it is because there never was a plan. Partnerships require many plans and making plans involves skill. If planning skills do not exist in your partnership, acquire them. Remember to use planning as a tool, not a straight jacket that prevents action. Although planning is a very good thing, it is possible to spend all your time planning and very little doing.

Evaluation Skills

As evaluation is an important aspect of partnerships, knowing how to do it and having the skills to do it well are important. Evaluation determines what success should look like, what information is required to measure success, what process is needed to collect and analyze the information and how to present it in a useful way. Evaluation requires strong research, analytical and technical skills as well as the ability to synthesize information. Even if you are not responsible for the formal evaluation, having the skills will help you ask key questions about the progress of the partnership and to participate in structuring the evaluation when it occurs.

Problem-Solving and Conflict Resolution

Where there are people, there can be problems, making conflict resolution a critical skill in partnerships. Problems related to sharing resources, power and decision-making, and where or how to allocate funds, all require advanced problem-solving skills. There are four basic steps to problem solving and conflict resolution:

- Define the problem.
- Understand the problem and who is involved.
- Identify possible options.
- Pick one and act on it.

Understanding problem solving and conflict resolution techniques is important to group dynamics and should be included in the training plan for the partnership. See Section 5 "Troubleshooting Guide and Help Section" for more information about conflict resolution.

CONFRONTING PROBLEMS

What can happen in partnerships if you don't address problems?

- Problems will persist or get worse.
- Individuals will continue to push their own perspectives.
- Individuals will challenge decisions that do not support their interests, or will make their own decisions.
- Individuals may seek legal remedies.
- There will be increased cynicism and divisiveness.

Get to the cause; don't just deal with the symptom!

Time Management

Time management means using our time in an effective and fulfilling manner. Too often we see time management as something beyond our control. We hear people say in frustration "if only I had more time". The assumption in time management is that we take enough time for the truly essential tasks. The problem isn't the lack of time; it's more about how we use the time we have and how we sort out our priorities.

Like any other resource -- financial or human -- time can be managed or mismanaged. Time is a very valuable resource in a partnership, especially when we are balancing different people's schedules and levels of involvement. One of the fastest ways to damage a partnership is to cause people to feel that their time is being wasted. Another way is to fail to provide enough time for the relationship to develop and take hold. Still another is to fall behind on schedules or commitments. Obviously, time management plays a critical role in partnerships and is, therefore, important to consider as a training area.

Financial Management

One of the most critical areas of responsibility assigned in a partnership is financial management and budgeting. Staying within a budget and efficiently managing financial resources are often the most important criteria used to measure the success of a partnership. Even if the partnership has achieved great things, the perception that resources are not well-managed or used wisely may undermine support for the partnership. Partnerships have a responsibility to set a budget, live within it, and be able to demonstrate that resources are being used efficiently.

The bottom line in good financial management is to:

- establish a budget and keep within it;
- get as much purchasing power as you can from your resources;
- be able to clearly demonstrate where and how you have used your money;
- identify in-kind contributions as having value; and
- meet any reporting or accounting requests required in or of the partnership.

Managing Outside Help

Regardless of the skills and expertise in the partnership, there may be times when outside assistance is required. Making the right decision about when to contract someone from the outside involves knowing:

- what you want done;
- what skills, knowledge or expertise are required;
- that it is not available from within the group;
- what the work should look like when it is finished;
- how much time and money it should take to get it done;
- where and how to locate and recruit someone to do it;
- how to prepare a schedule and contract that spells everything out clearly for all parties;
- when things aren't going according to the contract and schedule, how to discuss and alter that which isn't acceptable;
- if too much is unacceptable, how and when to revise or terminate the contract; and
- when to get legal advice for the partnership.

TIPS ABOUT WHEN AN OUTSIDE EXPERT IS NEEDED:

There are times when outside help is needed. For example, a skilled outsider might be helpful if a conflict is deeply entrenched and there is no neutral party to help resolve it, or if certain skills are not available in the group,

Use outside help:

- when partners are directly involved in a conflict;
- when there are matters of cultural or gender equity that need to be addressed, and the ability to do so has not been demonstrated in the past;
- when there are disagreements about whether or not there is a conflict; or
- when you want to acquire the skills possessed by an outsider.

STORY: GETTING HELP WHEN IT IS NEEDED

A maritime partnership was producing local artwork for souvenirs through a cooperative of artisans and artists. The partnership included the local financial institute as well as suppliers and marketing partners. It was a successful venture, in part because they hired outside help in the early stages to do a market assessment and to a provide expertise on pricing and distribution. Most of the members of the partnership had very specific skills related to either their art or the management of a business. What they didn't know they purchased. This not only increased the motivation of the group but also helped to secure the financing they needed by creating a better profit margin.

Recruiting and Working with Volunteers

Partnerships sometimes involve a mix of people both from organizations that pay them for being involved in the partnership and from the community, where their contribution may be voluntary. At times, the total membership of the partnership is voluntary or volunteers do some of the work. As a result, knowing how to recruit, support and work with volunteers is an essential set of skills needed in partnerships. Some of the most common skills are sensitivity, respect for time, the ability to value skills developed outside the workforce, appreciation for different motivations as well as skills related to providing feedback and retaining interest and enthusiasm.

STORY: WORKING WITH VOLUNTEERS

One aspect of a housing partnership involved having volunteers do much of the actual physical work. While there were realistic work schedules in place and much good organizing at the work site, after several sessions it became difficult to get people to come out to volunteer. Honest answers were provided when the volunteers were asked why. While there was agreement that it was a well-organized work project, two things were missing: it wasn't much fun, and they didn't feel appreciated. Changes were made so that volunteers were recognized for all of their contributions and the "all work, no play" attitude was altered so that people had a good time as well as doing a good thing.

Stress and Transition Management

We all have stress -- some of it is good, some of it is not. Too much of it can cause health problems, so it is important not to dismiss stress. Each person has different levels of stress, ways of responding to it and methods of reducing it.

Signs of stress include being irritable, having difficulty sleeping and experiencing feelings of fear or panic. As having a role in a partnership may result in stress, be aware of it and manage it if it becomes a problem. Training or professional help may be required when stress is a major concern to the partnership members, or if any individual is experiencing real difficulties with it.

The following are a few tips to help manage stress in partnerships:

- Make a plan to reduce stress and develop skills to do so.
- Discuss activities that will alleviate stress.
- Talk openly about stress and recognize the impact on everyone.
- Handle stressful situations as they happen -- they get worse if you don't.
- When it occurs, assess what exactly is causing the stress.
- Identify what part of the stress is related to the partnership.
- Determine which things are within your control to change and which ones are beyond it.
- Change what can or should be changed.

GROUP AND INDIVIDUAL ASSESSMENT OF SKILLS

SKILL	IN PLACE	NEEDS DEVELOPMENT
Managing Partnerships	(____)	(____)
Negotiation Skills	(____)	(____)
Group Processes	(____)	(____)
Team Building	(____)	(____)
Planning Skills	(____)	(____)
Evaluation Skills	(____)	(____)
Problem Solving	(____)	(____)
Conflict Resolution	(____)	(____)
Time Management	(____)	(____)
Financial Management	(____)	(____)
Managing Outside Help	(____)	(____)
Working With Volunteers	(____)	(____)
Stress Management	(____)	(____)

Specific Skills for Community-Based Partnerships

Community-based partnerships are, in many ways, like other partnerships. They require similar skills to be effective; however, their outcomes are not only important to the success of the partnership but also to the future of the communities in which they are operating. At the community level, the absence of skills such as planning, organizing, cooperation, courtesy and forward thinking can have repercussions beyond the partnership group. While it is essential to do things carefully and well in all partnerships, in community partnerships doing things in a very inclusive, open way and with proper respect is as important as getting everything right. This takes a great deal of skill and consideration.

Community Partnership Skills

There are some skills that are more likely to be needed in community-based partnerships than in others. A sample list is provided below, which your partnership may wish to discuss, add to or determine who in the partnership possesses these skills.

- Community Assessment
- Community Organizing
- Principles of Community Development
- Establishing Community-Based Enterprises
- Proposal Writing and Grant Seeking
- Building Trust and Rapport with Community Members
- Basics of Environmental, Economic or Human Resource Development (and the connection between them)
- Marketing, Advertising and Media Relations
- Making Good Deals
- Leadership Development

Partnerships are a Place for Learning

Partnerships are an excellent learning environment, a factor that often encourages people to join in or participate. Learning by experience and having a comprehensive training plan for both the group, as well as for certain individuals, is a sign of a healthy, growing partnership. As a matter of fact, building capacity and strengthening leadership are essential to maintaining a healthy partnership.

Since skills and expertise are required for all aspects of partnerships, training is almost always identified as a high priority. It is difficult to know in advance what types of skills are going to be required throughout the life of the partnership. Knowing on what area the work is going to be focused will give some indication of what might be required. Typical training requests from partnerships include facilitation skills, recording or bookkeeping skills, group or teamwork techniques and any specific knowledge related to the goals of the specific partnership.

Sometimes it is necessary to help make the connection between past experience and the knowledge or skills that might be useful in the partnership's work. Assumptions can get in the way of seeing things as they are. For example, although we may assume that accountants do not have experience with large group facilitation, they may well have this. On the other hand, we may assume that those who work with groups all the time, and who seemingly have good process or operational skills, will be committed to doing the work but, for whatever reason, they may not be able or willing to do so. As a result, there is a need to look at what skills the group already has and which ones people are willing to use for the purpose of the partnership. It is possible then to check assumptions and determine what training is required.

STORY: SHARING THE SKILLS

A partnership was developed between a First Nation and a large lumber company. The vision was to work together to harvest trees in a responsible fashion, to create jobs for local people and to build a sustainable economic base for the community. The industrial partner had skills and experience in logging, equipment use and forest management. The First Nation knew the land and the people's skills and values as well as the local politics and attitudes. There were several small companies that could provide spin-off services if they had some equity funding and training in business management.

Together they created an operational plan, a business development agreement and a training plan that took advantage of the existing resources and built on the skills and expertise of local people. By working together and sharing their skills, they were all able to get what they wanted and build their own capacity and skills.

Training Plans

Training plans are comprehensive overviews of the skills and abilities desired to operate the partnership itself and those required to reach the partnership's goals. Training plans address the individuals who need the skills and how they will acquire them. Although training is a high priority in most partnerships, the actual development of a training plan rarely is. There are several reasons for this. One is that so much work is done creating a vision and action plan that training is pushed to the side, or seen as a luxury for the partnership members, not as a direct cost of reaching the partnership goals. Another reason for not developing training plans is that putting together good training plans also requires certain skills. Partnership skills are often difficult to describe in a way that makes them distinct from any general management and planning skills. The skills are similar, but applied differently in the team environment of a partnership.

Regardless of the difficulties associated with describing the skills, a training plan should be developed as soon as the partnership can identify what skills are required. If it is not possible for the group itself to produce a training plan, outside help should be sought to determine what roles need to be in place and what skills are necessary to perform in those roles.

The following might be useful when thinking about training:

- Training should always be based on what skills will be acquired, not on what topics will be covered.
- Be able to provide examples of where the desired skills might be used, and try to use these skills soon after they have been acquired.
- Consider a variety of training methods as people learn in different ways and there are many options to choose from.
- Specialty skills may need custom-made training.
- Find trainers with whom you feel comfortable, and ask lots of questions to ensure that there is a fit between what is needed and the trainers' skills.
- Training should be appropriate, cost-effective and timely; don't settle for anything that is not right for your needs.
- Use partnership members as a resource.

Training specialists are focusing on partnership groups and, as they do, better and better training becomes available. If your group is having difficulty in finding suitable training, consult a trainer or training institution about your situation. Talk to several until you find a good match between what you need and a trainer with the skills, knowledge and attitude that fits. Having a training plan simplifies the discussion, as it will identify the skills that are needed and information about preferred delivery methods. Partners may wish to do a skills inventory within the group to determine what skills already exist and if there is a possibility to train each other or serve as mentors or facilitators.

Sometimes the cost of training or the location where it is offered makes it unaffordable or unrealistic, given financial or geographic restrictions. Do not give up on the training plan or the training; instead, look for other ways to acquire the skills and expertise the group needs. Partnership training is still relatively new but, nonetheless, it is becoming increasingly important and efforts are being made to have it more accessible.

TIPS FOR EFFECTIVE TRAINING

- If training is new for your group, start small.
- Draw on your own experiences, but get advice from others and learn from their successes and failures.
- Make sure you have the skills needed to manage the training process. If you don't have them, build them into your training plan.
- Put the right people in the right jobs and match people's values, interests and skills to the tasks that need doing.
- Some people find training easy and fun, but others are afraid of it and will need encouragement and support.
- Training does not work as an isolated event. It has to be connected to whatever comes next.
- If you need outside help, hire it! Try to build into the contract arrangements to transfer some of the trainer's skills to local people.
- Don't be afraid to ask questions and change directions when trainers, content or delivery methods don't go the way you expected.
- Make sure you evaluate the skills acquired in a training event -- not just whether people liked it or not.

Lessons from Experience

- Knowledge, attitude and skills are closely connected. What you know, how you feel and what you can do all apply to the partnership process in one way or another.
- Every member of a partnership has some skills and knowledge that will be useful. Taking the time to figure out how to best use these resources will benefit all involved.
- The skills and expertise that the partnership group doesn't have can either be attained through training within the group or purchased from someone outside the partnership.
- Building the capacity of the partnership is very important and usually requires a specific plan to ensure that it happens.
- The partnership should be as focused on learning and building capacity as it is on reaching the goals of the partnership.

Points to Ponder

- What basic knowledge and skills does your group have?
- Are there any attitude problems or difficulties that need to be addressed?
- What skills or knowledge do you need that are not held within the partnership?
- Where and how will the partnership acquire the skills or expertise?
- Is there a training plan in place? If not, why not?

SECTION 5 -
TROUBLESHOOTING GUIDE AND HELP

This section of the handbook identifies the most common difficulties that partnership groups encounter and offers some brief suggestions about solving them.

All partnerships experience difficulties at one time or another. The degree of difficulty, and the way the difficulty gets handled, will determine the impact to the partnership. Damage can be avoided by speaking openly about problems, working together to solve them and having some basic knowledge of what most often causes them.

Your partnership group is invited to discuss your own circumstances and add to the issues presented. The situations outlined here may fit right into your current partnership, while others may be more relevant in the future. Sort through the topics and use whichever ones suit your needs as a starting point for discussion. The experience that your own partnership members have will be the most useful when preventing or solving problems.

The Ten Most Common Problems and Solutions

The following factors have been identified by numerous partnerships as being both common and serious. They could make or break your partnership.

1. Facilitation and Leadership
2. Motivation
3. Managing Transition
4. Making Good Deals
5. Marketing and Promotion
6. Recognition and Celebration
7. Staying on Track
8. Asking Questions and Listening
9. Holding Effective Meetings
10. Burnout

1. Facilitation and Leadership

Objective facilitation and strong leadership are very important in partnerships. In their absence we flounder around without direction or, at best, accomplish very little either because no one or everyone is taking the lead on matters. Being a good facilitator or leader requires skills and experience. Lack of direction, loss of control or power imbalances can occur when a partnership does not have adequate or appropriate leadership. Establish a good process for your partnership and determine if the required leadership skills exist in the group. If they do not, make a plan to acquire them while continuing to develop these skills within the group. Don't hesitate to change a coordinator, chairperson or facilitator if the group is not achieving the anticipated and desired results from their efforts.

2. Motivation

Motivation is ordinarily based on two things: one is the reason for being involved in the partnership; and the other is the amount of energy or enthusiasm we will bring to it. Motivation, or the lack of it, can be a big concern in partnerships. It is important to be very clear about what is motivating each individual's involvement in the partnership thereby allowing everyone to know and understand the direction from which each person is coming.

Equally important is openly discussing what is needed to keep members interested in the partnership's work. It is much more difficult to get re-motivated after burning out or losing interest than it is to consider it right from the start. Motivation, much like attitude, is infectious.

MOTIVATION

Thoughts to be considered and discussed:

- In order to discuss motivation in partnerships it is beneficial to have a fundamental understanding of motivation in general.
- People feel motivated about life, ideas and activities to the degree that we feel we share in them, have a contribution to make or can be useful.
- Recognition and reward, no matter how small or seemingly insignificant, will go a long way to keeping us interested.
- Mostly we stay motivated as long as we feel satisfied about our involvement or the quality of the job we are doing.
- We particularly like to do things that use and build on our existing skills and help us to acquire new ones.
- Food, fun and companionship work well as motivators.

- So does the actual work of the partnership -- whether it is building a sandbox or putting the world back in order.
- Negative motivation is equally real and is usually caused by fear, guilt, pressure or someone pushing our buttons to get us to do things.
- States of "almost motivated" or "recently motivated" exist and should be acknowledged. Sometimes just mentioning it helps to move it along in the direction you want.
- People have phases of high and low motivation about life in general, relationships or the work in which we are involved.
- We can't stay highly motivated all the time nor can we be indifferent for extended periods.
- The responsibility for motivation is a combination of others doing the right things to keep us encouraged and the personal "do it yourself" method.
- What we eat, how we sleep and our relationship with ourselves and others, our gods and nature all play a role too.

3. Managing Transition

Change is a big part of life these days. Everything changes and often more than one thing changes at a time. How we respond to, cope with, or handle change is known as managing transition. Situations change while people go through transition caused by the change. Some people manage transition very well most of the time, others handle it poorly all of the time and many of us are somewhere in between. Transition is a serious business. If not managed properly or acknowledged in a partnership, damage to the partnership or to specific individuals may occur. It isn't just the transitions related to the partnership with which people are coping; in most cases they have more changes going on in their lives than they would like to have. Remember that everyone has a breaking point. Get expert help to acquire the skills to manage transition, and encourage stressed-out people to seek professional help.

STORY: MANAGING TRANSITION

A medium-sized, multi-party partnership was focused on tourism. It had, within the scope of the partnership, several successful businesses, much inter-community liaison and several major events each year that resulted in mini-partnerships that lasted only for the duration of the event. As well, there was a Community Development Corporation that generated a significant amount of revenue which, in turn, was lent out to fledgling businesses.

The most important aspect of their success was not being afraid of problems or of managing change as it came along. The transitions they went through from concept to small partnerships and then to taking larger risks -- and then to becoming very successful -- all took a toll. Partners were burning out, and they had to reassess how much was expected of those involved.

In doing so, they reassigned workloads and deliberately took a bit longer than they had planned for some things. They realized that even good changes can be stressful, and they were careful not to underestimate the demand this put on the people involved.

4. Making Good Deals

Often the difference between success and failure, in a partnership, is in how well we negotiate and make deals. We are conditioned to accommodate other people's interests and needs (often before our own), and we like to have win-win situations. This is great when it can happen; however, there are times when an agreement has to be made which results in there being winners and losers. Being able to come to agreement, compromising while ensuring that everyone is satisfied (really satisfied, not just able to live with whatever has been negotiated) is the art of making good deals. Sometimes arrangements are not equitable for all involved -- therefore it takes time, skill and experience to get them right. When there is an imbalance in the outcome, try to acknowledge it and move on without damaging relationships or the opportunity to work together in the future.

5. Marketing and Promotion

What's the sense of doing something important, good or useful if others don't know about it? Marketing and promotion serve many purposes in partnerships and need to be done properly if the image of the partnership is to stay positive. Marketing is much like advertising and can be effective for recruiting members, explaining the goals or purpose of the partnership or for soliciting support or resources. Promoting what you are doing is advantageous to the future of a strong partnership. If people do not know what you are doing, why you are doing it or what has changed because of it, they are not likely to care whether or not the partnership continues. Marketing and promotion should be well thought out in advance, not just put together in a hurry when there is a need or a

crisis. The acceptance of the partnership rests in how it is presented or communicated to outsiders. The influence your partnership has is dependent on how well it is accepted. Get help with it if the skills do not exist in your partnership group.

6. Recognition and Celebration

No one likes to be taken for granted. We all like to feel that what we do is valued and that we have accomplished good things. Being recognized and celebrating not just successes but other important times will make the difference between a close and comfortable partnership and an "all work, no play" group. Motivation and future involvement are dependent on how well the members in a partnership are treated, and whether or not they feel recognized. The one problem that seems to come up consistently is that everyone thinks that someone else should be doing the recognizing, or suggesting and organizing the celebrations. In a partnership arrangement, make sure that genuine recognition takes place and that celebrations are part of the shared business of the partnership.

7. Staying On Track

Many partnerships are focused and clear about what it is they are doing and how they are going about it. Others have difficulty organizing themselves and remembering what they are doing and why. Keeping on track is a matter of following the process steps while establishing a strong understanding of the goals and the action plan. When this fails, we normally seek direction from the leaders in the partnership who will bring the group back to the plan. When leaders aren't capable of this, the result is fragmentation and confusion. Staying on track involves having a clear direction, good leadership and discipline.

Sometimes we take partnership activities for granted or drift away from the focus of the work. We need to remember that partnerships take constant effort, and group team building is ongoing. Keeping true to the vision and values of the partnership will bring focus, while being attentive to members' interests, needs and motivations will add momentum.

STORY: STAYING ON TRACK

An historic neighbourhood in Edmonton had formed a partnership to promote and preserve the culture and history of their neighbourhood. This was the intended goal but, as the group became more inclusive and grew, other matters soon dominated the agenda. For example, there was interest in improving the quality of living in the community, so social, health and child/elder care matters were included as part of the partnerships goals.

Within a year, the original partners had lost interest and began to drift away. Before that happened, the partnership group decided to split into two groups so that they could each focus on their respective interests and stay on track toward reaching their visions, which were complementary, but not the same.

8. Asking Questions and Listening

Challenging questions such as those about expectations and roles can be difficult. Because of the sensitivity about such things, questions of this nature are often only partially addressed. The questioner may be made to feel too picky or pushy or not a real team player.

As a result, those people who have the confidence to ask a clarifying question once may not ask twice. If the question is asked a second time, and in a different way, and there's still no solid understanding, the questioner probably will give up. It is very common in new partnerships to be unclear about many things at a time when familiarity or trust may be lacking. Listen carefully to what is being asked and what is not being asked.

Regardless of the fact that we may not be very good listeners, and sometimes there is discomfort in asking these types of questions, they should be clarified and not left in the "unresolved pile". It's up to each person to keep track of the things that are personally relevant, making sure to ask enough questions to make things clear. You can be sure that, if you don't understand something, there are others who won't either and they may not be able to ask even the first question.

9. Holding Effective Meetings

Considering how many meetings most of us attend, it is amazing how many are poorly organized. Holding effective meetings will move a partnership forward, whereas ineffective meetings can hold it back. People will allow for a certain amount of growing pains in any new initiative, partnerships included; however, time is important to all of us, and almost everyone is busy these days. The best advice about what actually constitutes a good meeting will come from the people involved in your partnership. Asking them what they need and then providing it will keep meetings effective, valued and worth attending. It also will show that the partnership respects input from the group. The difference between a good meeting and a poor meeting is that a good one lives up to the participants' highest expectations and a poor one does not. It is impossible to meet expectations without knowing what those expectations are.

EFFECTIVE MEETING TIPS

For your consideration, the following are suggestions that have improved meetings:

1. Set a timeframe for your meeting and stick to it.
2. Provide the agenda in advance. Prioritize things as need be, and put a name beside each item so everyone knows who will deal with it.
3. Before proceeding with the meeting, ask if individuals have additional items they wish to have added to the agenda.
4. Keep paper to a minimum, but circulate what is necessary to ensure that all members are informed.
5. Make sure a record is kept of the key discussion points and the decisions reached. Point form is fine, and so are neat handwritten notes.
6. Set ground rules and enforce them.
7. Have a skilled chairperson or facilitator.
8. Acknowledge contributions, including comments or ideas. Don't leave things dangling in the air as if they weren't heard.

9. Handle conflict as it happens. Don't let things build up.

10. Have good food and refreshments at every meeting.

11. Initiate a "buddy" system for members who can't attend all meetings.

12. Don't have a meeting if another way of communicating will suffice. Determine what forms of communication will work for all (fax, e-mail, conference calls) and consider factors that will assist with special needs such as translation, Braille, larger print or audio-only requirements.

STORY: EFFECTIVE MEETINGS

One businessperson had enough meetings in his life without having to attend one every month for the sports-based partnership with which he was involved. While he was personally interested and his business benefited by being a partner, he hated the meetings, which were slow moving and very dense in providing information. He tried to be present for the big decisions but didn't care particularly for small matters such as what colour the teams wore.

When it became apparent that several others felt the same way, the entire partnership determined that they should have two types of meetings. One type became fast-moving, decision-making meetings that took less than an hour. The businessperson attended these meetings. The second type of meeting was responsible for smaller decisions, and those partners interested in detail work attended these meetings. A newsletter was produced to make sure that information was provided to all members about the work being done in both types of meetings.

Both groups got the kind of meetings they wanted and needed, and there was an effective use of everyone's time.

10. Burnout

Burnout is a term that we all know and understand. Many of us have experienced it and know that it has multiple causes. The most common factors related to burnout are having too much to do, little or no support to do it and feeling inadequate or unappreciated while doing whatever it is we are doing. Partnerships can create additional work on top of an already busy schedule -- a situation which is not always well understood by those in our organizations who are not directly involved. This may be stressful for all involved. As partnerships are a relatively new approach to how we do our work, we can feel uncomfortable with our ability to be effective as well as having concern about how much extra time it takes. Combined, this is the perfect formula for burnout.

Partnership groups may not be the cause of burnout, but they often include many people who are in the throes of extreme stress or over-burdening. It seems that those people who do things are always the ones who are selected to do more things. Partnerships are no exception. They are usually made up of the busiest people around, so burnout is a reality that requires discussion. Every partnership should discuss burnout and look for ways to avoid or modify its impact. As professional help may be necessary, be prepared to seek it when and if it is required.

Conflict Resolution

Most problems can be solved; however, conflict is often the result of unresolved problems. Conflict typically stems from one or more of the following six factors, which are listed below along with some tips about how to resolve them.

1. Power Struggles

Causes: usually created by an individual's personality or character, or when expectations are not being met.

Recommendation: address underlying issues like loss of control or history of conflict and take time to understand expectations and deal realistically with what can and cannot be done. Remember that the right solution might be that somebody leaves, hopefully without hard feelings.

2. Low Trust

Causes: can occur when leadership lacks skills, self-interests are not being disclosed or communication is poor.

Recommendation: get a new leader or provide skills to the existing one(s), discuss self-interests and open up communication. Practice good communication habits and discuss trust as one of the topics.

3. Loss of Focus

Causes: can occur when the members or leaders are not clear about the direction or vision.

Recommendation: go back and review the vision, remembering the difference between people who want small steps and immediate results and those who prefer to deal in the bigger picture. Link what is being done, and why, to the vision.

4. Lack of Leadership or Authority

Causes: occurs when partnerships do not have clear and shared goals and/or clear role and responsibility statements. In addition, lack of continuity due to a weak individual commitment and irregular attendance can contribute to this problem.

Recommendation: clarify authority and reason to be, ensure that the partnership is wanted and needed, insist on consistent representation and attendance at least until the partnership's foundation is solid.

5. Picking the Wrong People

Causes: when people are chosen or volunteer for the wrong reasons, or are sent and don't really wish to participate.

Recommendation: this is risky, but must be dealt with -- ask each member to review why they are involved, what they expect and what they will provide as well as where it fits in their priorities. Seek replacements for those who can't or won't live up to the group's expectations and needs.

6. In-Fighting About the Goals or Processes

Causes: occurs when people debate about the goals or methods of operation even after agreement has been reached. Sometimes happens when people cannot see success in the future.

Recommendation: review the goals for attainability. Can they be achieved? Revise to smaller steps if needed. Look at how things are planned to be done, and gather specific and concrete input if things need to change. Do not simply accept that it won't work -- look for suggestions about how it could be better. If it's really going off the rails, bring in outside expert help to facilitate.

Lessons from Experience

- All partnerships have some difficulties along the way. How these difficulties are handled is as important as the solutions that are found.
- Healthy partnerships can handle an amazing number of problems and much stress, whereas unhealthy ones can dissolve over what might seem like a fairly insignificant difficulty.
- Knowing the possible pitfalls in advance can help prevent some problems and help devise solutions when and if they do occur.
- Some difficulties that partnerships encounter require well-trained professional assistance. Wise partnerships determine when to handle things themselves and when to call in an expert.
- Understanding the cause of conflict, and how to resolve it in advance of having problems, will help the partnership.

Points to Ponder

- Has the partnership group considered what (if any) problems it might have now or later in the partnership?
- Do you currently hold effective meetings? If not, how can they be improved?
- What motivates the partnership? Can this motivation be sustained over time?
- What will the partnership do if it has difficulties that cannot be resolved within the partnership?

SECTION 6 -
TYPES OF PARTNERSHIPS

This section considers different types of partnerships and provides information about various aspects of each.

There are no "text book" partnerships; each one is different and has its own characteristics, functions, jurisdictions and parameters. Partnerships are not neat and tidy, and they most definitely are not predictable, although some traits appear more in some situations than in others. The following is a general overview of different types of partnerships and some of their characteristics.

Community-Based Partnerships

Community-based partnerships include a whole variety of initiatives. We refer to partnerships as being "community-based" when they take place in a community, have community members involved and have a direct impact on the community, rather than within an organization or institution. In community-based partnerships, the community is actively involved in all aspects of the process including identifying needs and making decisions. Even partnerships between agencies, businesses, governments and institutions can be community-based, provided that the goals and outcomes enhance something outside their own organization. Any time a partnership is formed for the purpose of helping people in the community or for a community cause, it is a community-based partnership.

Community-based partnerships:

- insist on local participation and empowerment
- encourage organizational and partnership development
- have planned inclusion and development of leadership
- support local entrepreneurs and businesses
- are often founded directly or indirectly by government
- are for the community by the community
- often integrate several areas of development (social, economic, environmental, cultural)
- question the status quo -- they have a desire for change

Understanding the Community Context

It is important to know about the community in which a partnership is operating. But what should we know? The obvious information about demographics can be useful -- how many people live here, what the major industry is or has been, what the current source and level of employment is, who the elected officials and community leaders are, and so on. These pieces of factual information are not always easy to obtain but they are the foundation for a community assessment.

Partnerships that work in a community context also require information about the pulse or life force of the community. Like people, communities have personality, energy, character and esteem, which fluctuate with the changes it goes through. From small isolated northern communities to large urban centers, communities have identities and confidence levels. The community's dreams and wishes, its strengths and weaknesses, how it takes advantage of opportunities or responds to difficulties all form the character of the community or neighbourhood. This character usually reflects the values held by the people who live there.

These items plus the factual demographic information combine to form a true picture of what the community is about. This is the community context.

COMMUNITY-BASED PARTNERSHIP PITFALLS	SOLUTIONS TO COMMUNITY-BASED PARTNERSHIP PITFALLS
1. Community services versus revenue generation -- leads to tension	1. Acknowledge the tension but do both -- they can be compatible
2. Being all things to all people	2. Focus on the partnership goals
3. Today's demands versus tomorrow's plans	3. Attend to the top priorities in the action plan
4. Fear of failure, risk, success, acceptance, change, etc.	4. Talk about your concerns -- be brave -- stick together and acknowledge fear, failure, hard work and successes
5. Not fully understanding where individual or group skills fit	5. Discuss current skill levels -- develop group capacity
6. Too few people willing to carry the load -- leads to burnout	6. Assign work – delegate -- then let them do it
7. Forgetting where you're heading and why it's important	7. Revisit the partnership's purpose and vision

Non-Resident Members of Community-Based Partnerships

Being a resident of the community isn't essential to being useful in a community-based partnership, but it helps. However, when you don't live in the community, additional responsibility rests with you to ensure that:

- you have a solid understanding of the community and what impact the partnership will have on it;
- your reason for being there is understood;
- you do not impose unrealistic expectations, time frames or direction;
- you have values and attitudes that are compatible with those of the community;
- you do not take over the process.

Outsiders may have the skills and resources needed to move ahead but the real power rests in the community itself with its residents. Until there is a bonding or a sense of how the community operates, you won't know who holds the real power, what the community desires or how they want to proceed. It is best to keep a low profile and listen -- a lot! This does not mean that nothing should be said, it just means that you should wait until you feel a degree of acceptance or until you have established a rapport.

When you reach a point of comfort or acceptance in the community, try to think of it as if it were your own -- or, better still, think of it as the future home of your grandchildren. Personalizing your input draws you closer to the people whose grandchildren really will be the future residents. Rural, Aboriginal, northern and isolated communities in particular are concerned about outsiders coming to "help" when their help imposes outside values on them (even when it is with the best of intentions). All communities are capable of dreaming and making those dreams become reality -- it may only require some facilitation or resources to put their ideas into action. This is usually why non-residents become involved.

STORY: NON-RESIDENTS IN PARTNERSHIPS

A northern group was hosting a partnership training session on that dealt with the issue of partnerships being created that included non-residents of the community. The general feeling was that often partners are not community members -- usually they were from government or industry. They were people or companies working in the area who lived elsewhere. After much debate, the general feeling was that these people did have a connection to the community and, as such, they would have the community's well-being at heart, not just their job or company's profit.

Although they were careful to say these outsiders should not control a partnership, they saw no reason why a partnership couldn't work if the values and vision were shared, and local people had the ultimate control and responsibility for decisions that would affect them.

Resident Members of Community-Based Partnerships

Often people who make their home in a community do not necessarily feel they are part of what the partnership is addressing, even when the partnership has invited their participation. Not everyone has to be involved; however, representation is an interesting issue. Representation (or the lack of it) isn't just a matter of residence. It is also about how the individual partners feel about belonging to the partnership when they are speaking for others who are not there, even when those they are representing are aware of the partnership and its value.

Community residents in a partnership must give consideration, not only to their own involvement and contribution, but also to:

- who else needs to be involved,
- when the others should be included,
- how that should happen,
- what those who aren't in the partnership will expect from those who are, and
- how information will get to them.

The entire partnership group shares these responsibilities but it is usually the people who are the most visible (such as those who live in the community) who receive the questions, comments and resentment. It is often directed toward them personally or professionally if the partnership is perceived to be exclusive.

Rural, Northern and Urban Partnerships

Partnerships in either a rural or urban area have different advantages and drawbacks, depending on the focus and requirements of the partnership. For example, urban areas have the benefit of a larger population base from which to draw, and often have better access to resources and influence. Rural areas tend to work more closely together due to their history and familiarity, and the fact that they usually know what local resources are available and how to get them.

Conflict and confrontation sometimes occur in partnerships, resulting in hard feelings or negative experiences. In urban partnerships, we may not have to think about it or see the people involved until the next meeting. In smaller communities, however, we see each other on the street, at the store or in the post office. Because of the community politics and dynamics that exist in rural or northern communities, it is much more risky to have open discussions about power, self-interest or concerns; discussions around the partnership table rarely stay there in a closely-knit community. While this may be okay, problems arise when misinformation or information taken out of context occurs. Care must be taken to be open and inclusive while keeping confidential matters confidential.

Although small, rural and northern communities often talk about being isolated, urban partnerships can have an isolation of their own. It's possible to seem invisible or not feel connected to anything when you are a small fish in a big pond. In rural areas, as well as in closely-knit urban neighbourhoods, everyone is usually aware of

what's going on all the time, which could be good or bad, depending on how prepared the partnership is to share information. Urban information sharing, on a large scale, is complex and expensive, while rural information travels as fast or even faster than it happens. The comparison is that of buying an ad in a major newspaper or putting up a notice on the town bulletin board.

Regardless of the location, partnerships can have similar experiences related to acceptance or rejection. They all have communication issues, competition for talent or resources and difficulty with reaching goals. In communities of any size or place, we seem to overuse or burn out the key people and expect that partners will balance their own time and manage their own participation.

Technology, improved communication systems and better travel options have narrowed the gap between urban and rural to a certain degree and have managed to save time and the need for face-to-face communication all of the time. These things, however, do not make rural, urban or northern partnerships the same even when they have similar goals and are of a similar size. There are different ways of approaching partnerships in each context. Those who best understand this live in or are involved in the particular community, and they are the best ones to manage the partnership and make decisions.

Government Partnerships

Partnering with government has begun to replace short-term programs and ad hoc projects. Many government staff roles have changed. Individuals, who previously responded to requests for funding with program dollars or grants, are now faced with developing or participating in partnerships. One of the realities around this is that both the government representative and others in the partnership group probably have previous history and associations that are not always consistent with working as equals in partnership. New skills and understanding are required on both sides in order to appreciate what can be achieved in this new type of relationship.

Government is often seen as the source of funding and the maker of the rules. In community-based partnerships, the needs of the partnership come first and the role of government (or any other funder) comes second. Basically, members must shift their thinking from fitting into program guidelines to looking at long-range goals and finding resources that are appropriate. Government representatives must consider what else they can contribute to the partnership besides money. They must view partnerships for what they are -- a sharing of risk, responsibility and resources.

Other considerations about government partnerships include the fact that most government departments are bound by legislation and must be accountable for the use of public funds. This may cause some limitations in the use of funds and almost always involves audits and

monitoring. The particular monitoring and audit requirements of government should be included in the partnership's planning and evaluation components.

Reporting lines within government are structured, mandate specific and often time consuming. Sensitivity is required to appreciate that no government representative can be all things to all people and that political agendas and realities play a large role in determining the contribution that government can make.

Attitudes have to shift. Neither the government representative nor the other partners have all the answers, all the resources or all the power. What they do have is an opportunity to use new approaches to help improve the community.

Regional or National Partnerships

Although partnerships are most often associated with one community or neighbourhood at a time, there are other partnerships that span several communities, a region or the nation. Often they are initiated by or at least involve one or more levels or departments of government or a national agency funded by the government. These sorts of partnerships could cover a region, two or more provinces or all the provinces and territories in Canada. While communities themselves face their own unique challenges, there are many common issues across the country, such as high youth unemployment, health and safety improvements and environmental matters, that may best be addressed by a larger-scale effort or a more encompassing partnership. These sorts of partnerships are often undertaken through or under a formal accord or inter-governmental agreement when there is more than one level of government involved.

The economies of scale associated with a national or regional partnership may allow for greater investment in partnership. This sometimes enables communities to address longer-term, more complex issues and creates a bigger picture of the opportunities and innovations that are possible, while providing different locations to test or pilot solutions and models. Although bigger is not always better, regional or national partnerships allow for a greater scale and variety of results.

Having a national or regional focus does not preclude having strong local responsiveness. Many national organizations have excellent sub-structures which can ensure appropriate and timely responses to local needs and considerations. At both the national and regional levels, partners need to be flexible, open with communication and dedicated to the partnership goals. In some cases, this may mean modifying procedures; in others, it could mean balancing long-term and short-term considerations. Large-scale partnerships such as these are most likely to be successful if they are initiated on a smaller scale, to gain operational experience, in advance of developing at a regional or national level.

STORY: DIFFERENT TYPES OF PARTNERSHIPS

A Community Futures Board was reviewing a request for assistance from a social enterprise group who wanted to work with three other groups to generate both jobs and revenue. They were very clear about the fact that they wanted to form a partnership in order to create a structure that could accommodate everyone's needs and to ensure commitment. What wasn't clear was what type of partnership should be established. By sorting out the various activities that were to take place, it became less confusing. A lawyer provided legal advice for the parts that required it, and guidance was sought from a similar group in another part of the province. In the end, a partnership was established that housed a not-for-profit venture and a small limited company that generated revenue. One part of the partnership was a government-community partnership and the other was a partnership between community agencies.

CONCLUSION

In the preceding six sections of this handbook, we have looked at what partnerships are and how to make them effective. There is no absolutely right way to approach partnerships; however, there are lessons that have been learned along the way and lessons that are being learned right now. Hopefully, your experience in a partnership will add to the positive experiences that are occurring across Canada. Partnerships are not about organizations; they are about people. The very idea of working together, rather than independently, is cause for excitement and optimism, tempered with some caution about doing bigger and better things and having the skills and ability to do them well.

Together people can make a difference, and working in partnerships is a good way to bring people together to reach common goals. This handbook and the facilitator's guide, which is also available through Human Resources Development Canada, are two of the many resources available to you and your group as reference material or as training tools. Additional information on partnerships is available in bookstores, on the Internet, through colleges and universities and from various government offices.

The very best reference material and expertise comes from others who are working in partnerships who have first-hand experience. Don't hesitate to contact people. Finding them might be as easy as calling your local Chamber of Commerce, an employment office, or a community agency. It may take one or two calls but someone will be sure to know of existing partnerships that fit your interests. Use your network and resources to find out what is going on and how you can share your learning and experience or gain that of others.

A Word from the Authors . . .

This handbook was initiated at the request of several different groups in Canada that are working in partnerships at the community level. Some are involved in government-funded initiatives, others are not. Some are at the beginning of the partnership process while others are more established. Each one is unique. What they have in common is a desire to be effective in forming and operating partnerships and an interest in sharing information, knowledge and experience within their partnership groups as well as with others.

Obviously, the information provided in this handbook is not all that there is to know about partnerships. It is simply the basics, along with a process to work through the development of a partnership and some guidance about common problems and issues. What is significant about The Partnership Handbook is that it has been written with the input of many individuals representing organizations in a wide variety of partnerships across Canada. Their work is having a significant and positive impact on how things are being accomplished in communities and within their organizations. It is from their experience and their ideas that this handbook's content evolved and the ideas took shape.

It is on behalf of them that you are offered --

Good Wishes For Success in Your Partnership Ventures!